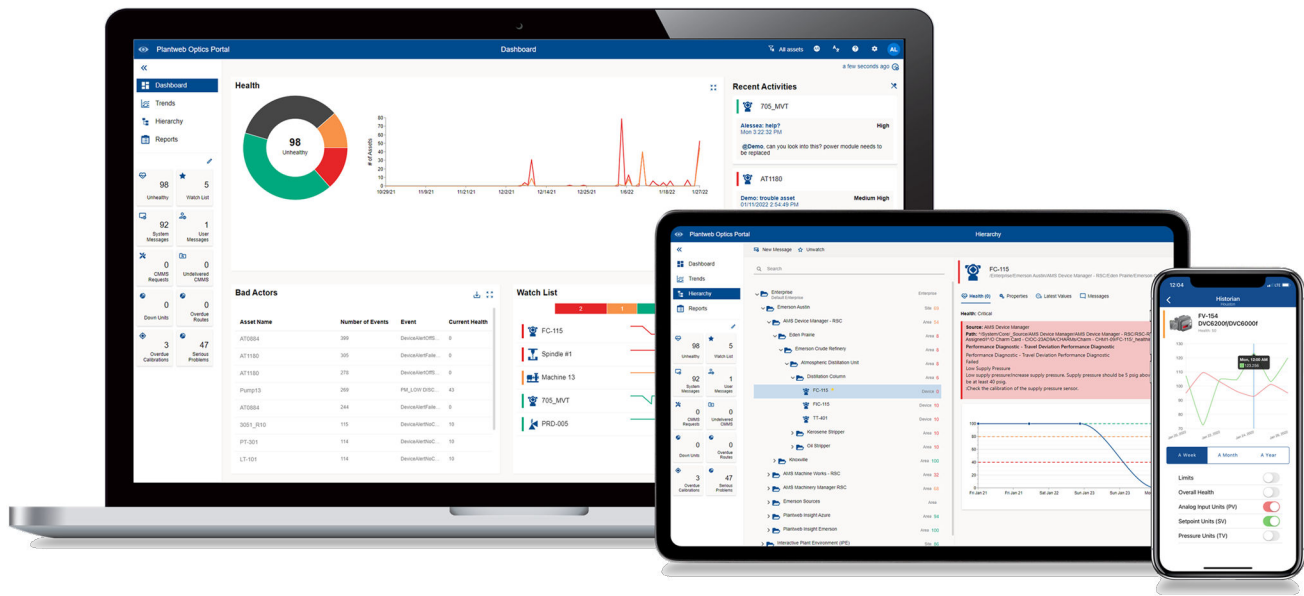


Plantweb Optics Portal - Quick Look



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1 Plantweb Optics Portal (What's New)

Plantweb Optics changes from previous versions

- **Asset (Explorer)**–configuration and set-up tasks moved to Plantweb Optics DataStudio.
- **User management tasks**–moved to Plantweb Optics DataStudio.
- **Other System Manager tasks**–moved to Plantweb Optics Portal Settings (System/Admin).
- **Out of Service Assets**–replaces the Plant Calendar view.

New capabilities

- **Current Asset Health Status**–health scores display color-coded as *Critical*, *Warning*, *Good*, and *Other* (health not set or ignored asset). Score ranges configured by installation.
- **History of unhealthy assets**–trend showing asset management and maintenance effectiveness.
- **Persona-based asset view**–assets display based on user permissions (realm of responsibility) and asset filtering.
- **Recent Activities**–displays the five assets with the latest User Messages. (Can restrict messages to those in which the signed-in user is tagged).
- **Message KPIs**–separately see system- and user-generated messages (7, 30, 60, or 90 days).
- **Bad Actors**–identifies assets frequently in alarm and counts events by asset type. The Bad Actors Report can be evaluated for 7, 30, 60, or 90 days).
- **Watch List**–quick access to unique assets selected by you, which are operationally critical or have been causing problems.

More new capabilities

- **Filters**–user can now filter assets by criticality. Filter applied to all the KPI asset lists is designated with its name in the User Toolbar. User can save a maximum of 10 User Filters. Administrator can define a maximum of 10 Global Filters.
- **Unhealthy Report**–CSV export file includes up to five top health contributor details (if available).
- **Messages**–two distinct presentations with the most recent messages at the start of each list. Messages include details about type, source, asset (hierarchy I/O path), and severity. Message filters on demand to provide a robust audit trail of events.
- **User Tagging**–done directly in messages for enhanced visibility. When your user login is tagged, messages are highlighted with an orange bar.

- **Join keys**—easily identify which mobile and AR join keys are disabled or assigned to users.

Security and User Permissions

- **User Permissions**—set in the Access Model to override user settings in the Plantweb Optics Portal. This defines the user's realm of responsibility for portions of the plant's assets.
- **Single Sign-on access**—supports both Plantweb Optics DataStudio and Plantweb Optics Portal.
- **Data diode**—support between the AMS Device Manager Data Collector and the Proxy/Connector Service. Future releases will provide data diode support for other connectors.

Database

Changed from a SQL database to using MongoDB (NoSQL) as the Plantweb Optics Data Repository.

2 Optics Portal Feature Locator

This table briefly describes how to find a specific Plantweb Optics Portal feature.

Table 2-1: Where in the Optics Portal do I find this feature?


Feature	Located in	(Breadcrumbs) To get there...
90-days Health Chart	Dashboard	Click  icon
Active Filter	User	Filter name by the  icon
Add Health to Trends Graph	Hierarchy/KPIs	Click  icon > Select Asset > Click Add Overall Health to Trends option
Add Parameter to Trends Graph	Hierarchy/KPIs	Click  icon > Select Asset > Click Latest Values > Select a check box under the  icon
Admin	Settings	Click  in User Toolbar > Click View All Settings > Click Admin
Asset Header	Hierarchy	Click  icon > Select asset
Bad Actors (brief display)	Dashboard	Click  icon > Click  icon
Bad Actors (export)	Dashboard	Click  icon > Click  icon
Bad Actors (all fields)	Dashboard	Click  icon > Click  icon
Bad Actors	Reports	Click  Reports icon
Bad Actors	Settings	Click  in User Toolbar > Click View All Settings > Click System: Bad Actors
CMMS Configuration	Settings	Click  in User Toolbar > Click View All Settings > Click System: CMMS Configuration
CMMS Requests KPI	KPIs	Click  icon > Click  CMMS Requests
CMMS tab	Hierarchy/KPIs	Click  icon > Select Asset > Click CMMS tab
<Custom Name> KPI	Dashboard	Click  icon > Click <Custom Name>
Dashboard	n/a	Default Optics Portal browser page at login
Default Filter	Filters Dialog	Click  in User Toolbar > Click  Show Filters icon
General	Settings	Click  in User Toolbar > Click View All Settings > General List
Global Filters	Settings	Click  in User Toolbar > Click View All Settings > Click Admin > Click Global Filters
Global Filters (apply)	Filter Dialog	Click  in User Toolbar > Click  Show Filters icon
Guardian Information	Dashboard	Click  in User Toolbar > Click View All Settings > Click Admin > License > Click Guardian Information
Health Circle Graph	Dashboard	Click  icon

Table 2-1: Where in the Optics Portal do I find this feature? (continued)















































Feature	Located in	(Breadcrumbs) To get there...
Health	Settings	Click  in User Toolbar > Click View All Settings > Click System: Health
Health tab	Hierarchy/KPIs	Click  icon > Select Asset > Under asset header
Hierarchy (Asset)	Hierarchy	Click  icon
Join Keys (settings)		Click  in User Toolbar > Click View All Settings > Click Admin > Click Join Keys
KPIs tab	Hierarchy/KPIs	Click  icon > Click desired KPI > Select Asset > Click KPIs tab
Language	Settings	Click  in User Toolbar > Click View All Settings > Click Admin > Click Language
Language (select)	Toolbar	Click  icon
Latest Values tab	Hierarchy/KPIs	Click  icon > Select Asset > Click Latest Values tab
License	Settings	Click  in User Toolbar > Click View All Settings > Click Admin > Click License
Log Out	User Toolbar	Click last icon (right side) on User Toolbar
Message Filters	Settings	Click  in User Toolbar > Click View All Settings > Click Message Filters
Messages tab	Hierarchy/KPIs	Click  icon > Select Asset > Click Messages tab
New Message	CMMS Requests CMMS Undelivered User Messages	Click  icon > Click  User Messages > Click  New Message
New Notification	CMMS Requests CMMS Undelivered User Messages	Click  icon > Click  User Messages > Click  New Notification ¹
Notifications	Settings	Click  in User Toolbar > Click View All Settings
Out of Service Assets	Reports	Display  icon > Click Out of Service Assets Report
Properties tab	Hierarchy/KPIs	Click  icon > Select Asset > Click Properties tab
Quick Display Settings	User Toolbar	Click  icon on User Toolbar
Recent Activities	Dashboard	Click  icon > Click  show Recent Activities icon
Severities	Settings	Click  in User Toolbar > Click View All Settings > Click System: Severities
Show/Hide KPIs	Dashboard	Select  icon in top-right KPI tile > Click pin  or unpin 
Show/Hide KPIs	Quick Settings	Click  in User Toolbar > Select Displayed KPIs check boxes
Spam Management	Settings	Click  in User Toolbar > Click View All Settings > Click System: Spam Management

Table 2-1: Where in the Optics Portal do I find this feature? (continued)

Feature	Located in	(Breadcrumbs) To get there...
System Information	Settings	Click  in User Toolbar > Click View All Settings > Click System Information
System	Settings	Click  in User Toolbar > Click View All Settings > System List
System Messages KPI	KPIs	Click  icon > Click  System Messages
Time since last update	Dashboard	Hover over  icon
Trends	Trends	Click  icon
Undelivered CMMS KPI	KPIs	Click  icon > Click  Undelivered CMMS
Unhealthy KPI	KPIs	Click  icon > Click  Unhealthy
User Filters	Filter Dialog	Click  in User Toolbar > Click (>) Show Filters
User Messages KPI	KPIs	Click  icon > Click  User Messages
User (General)	Settings	Click  in User Toolbar > Click View All Settings > General list
User Toolbar	n/a	Optics Portal login page
Users	Settings	Click  in User Toolbar > Click View All Settings > Click Admin > Click Users
Watch List (Display)	Dashboard	Click  icon
Watch List KPI	KPIs	Click  icon > Click (★) Watch List

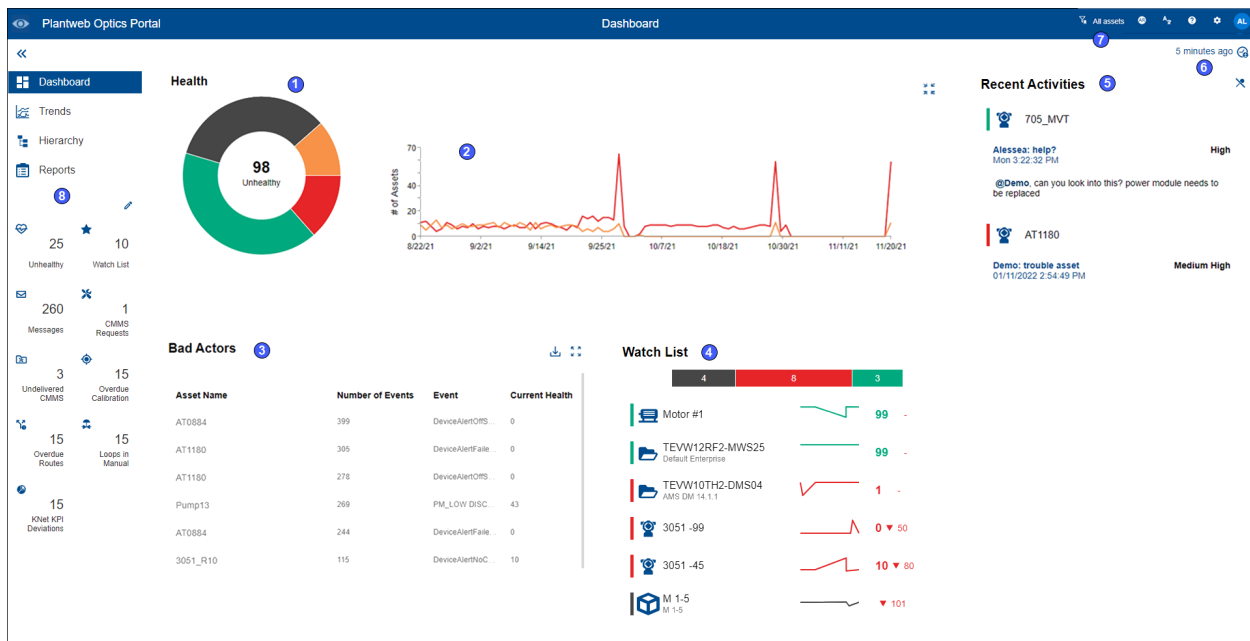
¹ Your profile or user ID must have explicit permission to "Create Work Notifications" for you to use this feature.

3 Dashboard

The Dashboard is a persona-based, user interface that provides an overview of the health and history of all known assets within your area of responsibility.

Along with providing a quick view of the health of your assets, the Dashboard also provides information about Bad Actor assets, assets that are a part of the Watch List, and messages that are tied to the assets in your environment. The Dashboard is a dynamic page that refreshes the information displayed on the page at a cadence that you set. You configure the Dashboard refresh rate in the Display Settings. See Related information for details about setting the Dashboard refresh rate.

Figure 3-1: Plantweb Optics Portal Dashboard



Legend	Feature	Description
1	Health: Circle Graph	Distribution of the number of assets in each health classification.
2	Health: 90-day Health Status Trend	Number of assets categorized with a Critical and a Warning health score, plotted for the previous 90 days.
3	Bad Actors	A list of assets that create numerous events and have the potential to fail. Your Admin defines the criteria for the assets designated as "Bad Actors."
4	Watch List	A list of assets you designate to closely monitor.
5	Recent Activities	Displays the five assets with the latest User Messages.
6	Time since last update	The time since the Plantweb Optics Portal was updated from the Data Repository. Plantweb Optic Connectors send event information to the Plantweb Optics Repository.

Legend	Feature	Description
7	User Toolbar	A set of user features including Filters and Quick Display Settings.
8	Left pane settings	Displays or hides text for key Optics Portal pages (Dashboard , Hierarchy , Trends , and Reports) and the KPI List Views.

3.1 Health circle graph

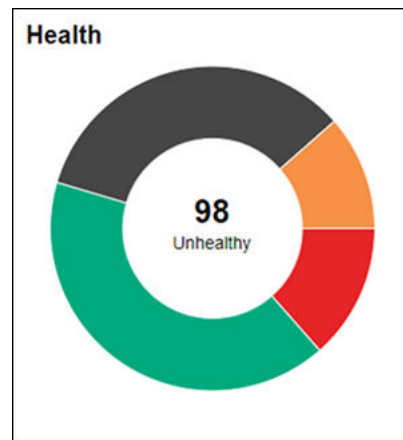
Use this **Dashboard** graph of the current asset health distribution; each section represents the number of assets in a specific health category. Health scores range from 0 through 100. The number graphed items also depends on the current Active Filter. Out of services assets count as **Other**.

Your Plantweb Optics Administrator defines the health categories:

- **Critical**–(red) health scores in lowest range.
- **Warning**–(orange) health scores in middle range.
- **Good**–(green) health scores in highest range.
- **Other**–(gray) no health score reported or an out of service asset.

Your Plantweb Optics Administrator sets the values for health ranges of (**Good**, **Warning**, and **Critical**).

Figure 3-2: Health circle graph



Switch between showing **Unhealthy** and **Good** counts using the **Dashboard Health Status Count** setting in the Quick Display Settings. Click the (⚙️) icon to display.

Hover over any slice of the Health circle graph to display the number of assets in that health category.

Click collapse (x) icon to hide the 90-day health status trend. Click (x) to redisplay.

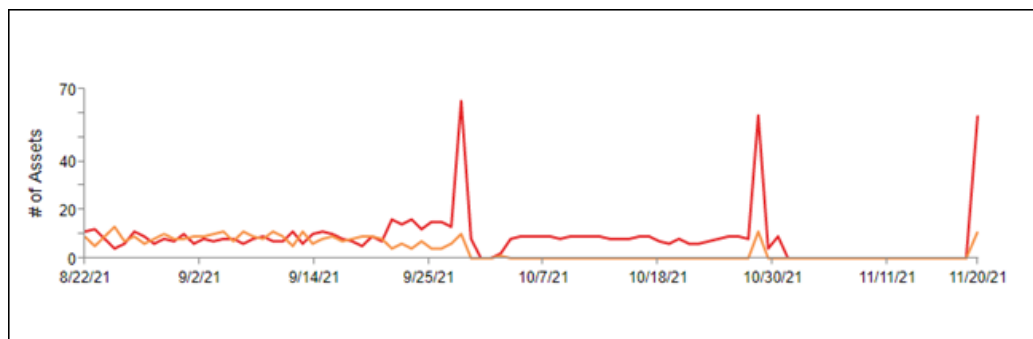
3.2 90-day health status trend

Display the number of assets in the poor health categories for the past 90 days. The trends shows the number of assets having a health score categorized as **Critical** (red) and **Warning** (orange). Trend values depend on which assets the currently Active Filter passes. Out of service assets are counted in these trends.

Note

This trend chart is *not restricted* to your area of responsibility. It includes *all assets* in the hierarchy.

Figure 3-3: 90-day health status count trend



Click and hover to see the assets identified in the **Critical** and **Warning** health categories for each day.

3.3 Bad Actors display

Assets associated with potential failures and assets that create numerous events:

- Calculated once per day.
- Administrator selects the evaluation interval (previous 7, 30, 60, or 90 days) and the criteria to define *Bad Actors*.
- Displayed assets listed after applying your currently Active Filter.
- Expand the asset display to show more information, such as the Asset description and Asset Path.
- Hover over the path name to see the complete asset path in ISA-95 equipment hierarchy.
- Includes out of service assets.
- Export asset information to a comma separated-value (spreadsheet) file. Click (↓) icon.

Figure 3-4: Bad Actors - partial asset information

Bad Actors				
Asset Name	Number of ...	Event	Current Health	Days Since ...
Site	405	HierarchyUpd...	47	90
711727	396	PM_HIGH C...	39	90
711587	396	PM_HIGH C...	39	90
711587	396	PM_HIGH S...	39	90
711587	396	PM_HIGH S...	39	90
711587	396	PM_HIGH V...	39	90

Legend	Description
1	Partial Bad Actors asset information.
2	Download (↓) and export Bad Actors asset information.
3	Expand (⌵) display to show the complete Bad Actors asset information. Click (📄) Reports and display Bad Actors Report .

Figure 3-5: Bad Actors - complete asset information

Bad Actors												
Asset Name	Number of E...	Event	Current Health	Days Since ...	Criticality	Area	Manufacturer	Serial Number	Tag	Last Health ...	Asset Descri...	Asset Path
711330	20	PM_HIGH S... S...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711330	02/15/2022 1:...	Pump	/Enterprise/Si...
711330	20	PM_HIGH S... S...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711330	02/15/2022 1:...	Pump	/Enterprise/Si...
711330	20	PM_HIGH S... S...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711330	02/15/2022 1:...	Pump	/Enterprise/Si...
711330	20	PM_HIGH B... B...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711330	02/15/2022 1:...	Pump	/Enterprise/Si...
711330	20	PM_HIGH V... V...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711330	02/15/2022 1:...	Pump	/Enterprise/Si...
711330	20	PM_HIGH B... B...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711330	02/15/2022 1:...	Pump	/Enterprise/Si...
711331	20	PM_HIGH S... S...	39	-1	0	Pump Applica...	Rosemount	ABC 123456	711331	02/15/2022 1:...	Pump	/Enterprise/Si...

Legend	Description
1	Bad Actors complete asset information.

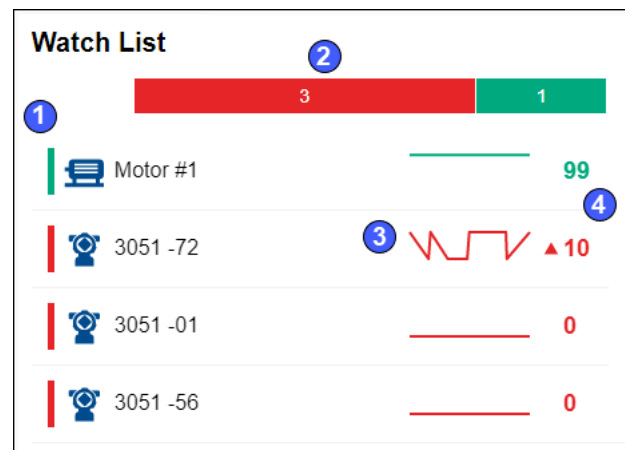
Legend	Description
2	Click any column title to display asset information in ascending (^) or descending (v) order.
3	Download (↓) and export assets to CSV file.
4	Hover over Asset Path to see asset location in ISA-95 Equipment hierarchy.
5	Click collapse (⌵) icon to show brief asset information.

Your administrator defines the connectors and event types in the **Bad Actors-System Settings**.

3.4 Watch List

Monitor assets for performance and maintenance issues. Click an asset to display the full information in the **Watch List** KPI List View.

Figure 3-6: Watch List



Legend	Description
1	Assets based on your selections and the current Active Filter.
2	Health bar (Critical, Warning, Good, and Others) showing distribution of health categories for assets on your Watch List.
3	Display seven-day running health of each watched asset.
4	Arrow shows change in asset health based on the current health value.

3.5 Recent Activities

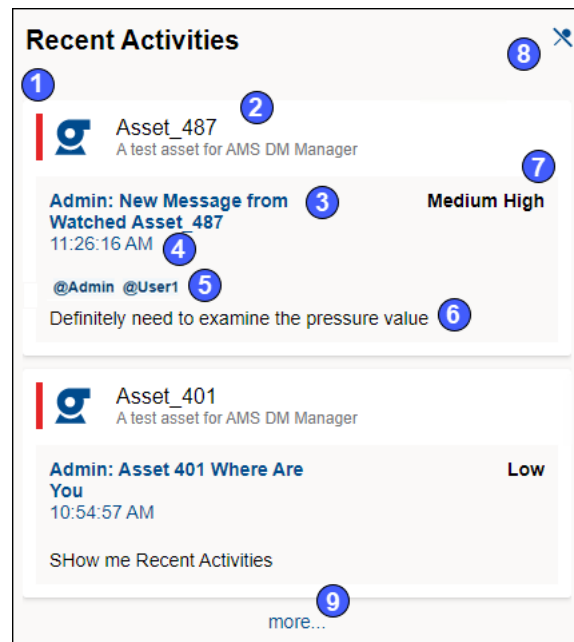
Use the **Recent Activities** to see the five assets with the latest User Messages. The messages displayed are filtered with the current Active Filter, the **Message Filters** settings, and include all asset Class types. Messages about out of service assets are included.

For each message in the **Recent Activities** list:

- The asset health category as a colored bar; Red–Critical, Orange–Warning, Green–Good, or Black–Other.
- Asset name and asset description
- List of users tagged
- Message Severity

Click reveal (📄) icon to re-display the hidden **Recent Activities**.

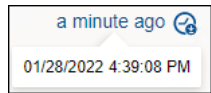
Figure 3-7: Recent Activities



Legend	Description
1	Asset health category
2	Asset name and Description
3	User name of sender and the subject line
4	Time message sent
5	Users tagged
6	Message details
7	Message Severity
8	Display (📄) icon or hide (🔒) Recent Activities .
9	Click a message (or click more...) to display message details and respond.

3.6 Time since last update

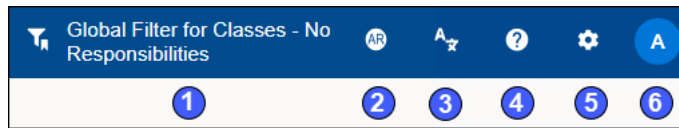
Time since the **Dashboard** was updated with new information from the Plantweb Optics repository. Hover over the last update time, the date and time of the previous Optics Portal update displays.



3.7 User Toolbar

You can perform several functions with the User Toolbar.

Figure 3-8: User Toolbar



Legend	Description
1	User Filter name used as the current Active Filter.
2	Start Augmented Reality application (with join key license)
3	Change your language for the Plantweb Optics Portal interface.
4	Display <i>Plantweb Optics Portal Help</i> .
5	Show Quick Display Settings pane.
6	Display user account information and link to log out of Optics Portal.

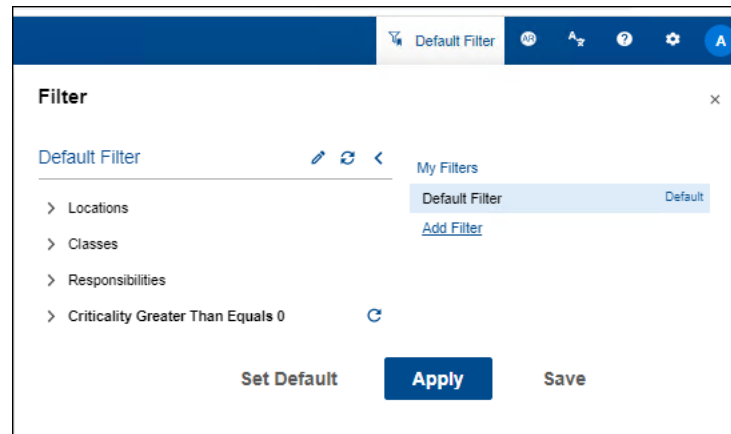
3.7.1 Work with User Filters

When you click the (Y) icon on the User Toolbar, you display the **Filter** dialog.

Using this dialog, you can:

- Display a **Global Filter**, change the selections, and save it as a *new* User Filter.
- Designate a User Filter as the current Active Filter.
- Change the specifications of a User Filter.
- Delete a User Filter.
- Set a User Filter as the **Default** Filter.
- Apply a **Global Filter** as the current Active Filter.

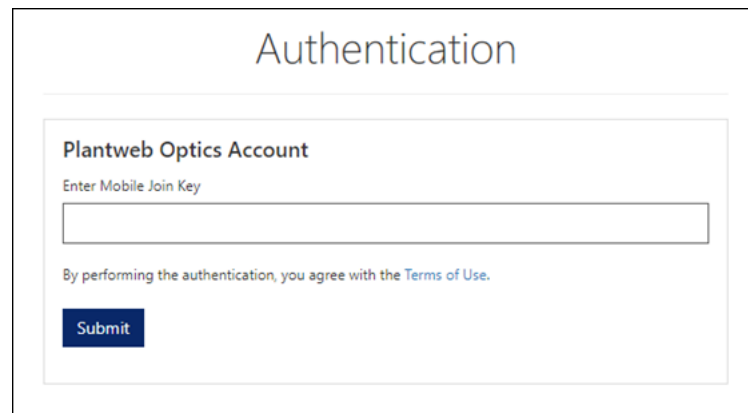
Figure 3-9: Filter dialog



3.7.2 Access Augmented Reality application

When you click the (AR) icon on the User Toolbar, you display the Augmented Reality app Authentication (login) in a new browser window.

Figure 3-10: Use a join key to authenticate access to the Augmented Reality application



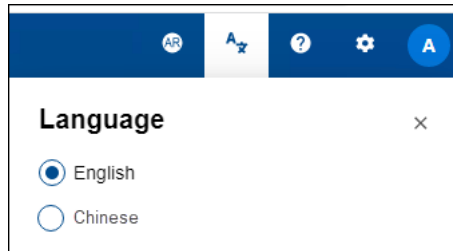
3.7.3 Change user interface language

When you click the (A) icon on the User Toolbar, you display the **Language** dialog to select the desired user interface language. Your Plantweb Optics administrator can place several language packs on your system.

Note

The user interface text changes to the selected language. However, the system messages coming from the Plantweb Optics Connectors remain in English.

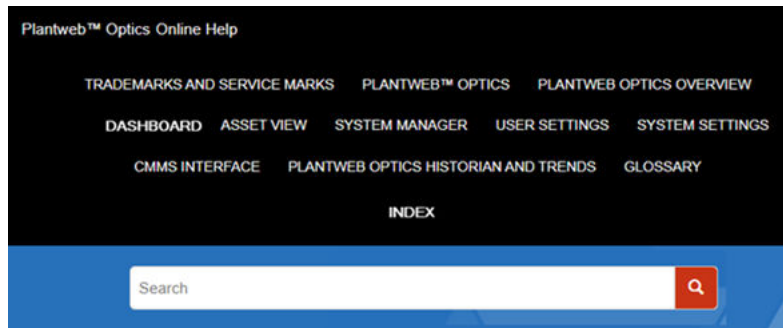
Figure 3-11: Select language for user interface text



3.7.4 Display Plantweb Optics Portal Help

When you click the (?) icon on the User Toolbar, you display the *Plantweb Optics Portal Help*.

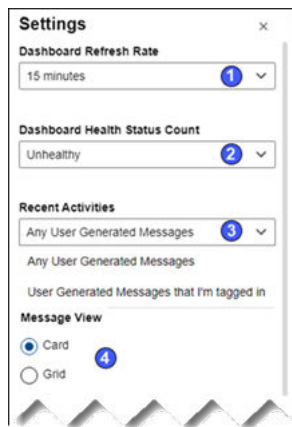
Figure 3-12: Plantweb Optics Portal Help



3.7.5 Show Quick Display Settings

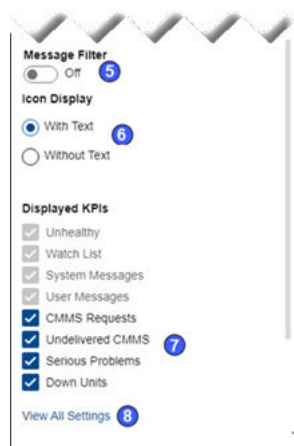
Click the (⚙) icon on the User Toolbar to display the Quick Display **Settings**. Make your selections. The **Dashboard** changes immediately. Click (X) or outside the pane to hide **Settings**.

Figure 3-13: Quick Display Settings (part 1 of 2)



Legend	Description
1	Set Dashboard refresh interval in minutes or hours.
2	Set type (Unhealthy or Good) of Health Status Count (Health: circle graph).
3	Select message type (Any User Messages or Messages that I'm tagged in) to display in Recent Activities .
4	Select the Grid or Card message format.
5	Turn On or Off the Message Filter .
6	Display asset dialog tabs with or without text (icons only).
7	Select which KPIs to display on the Dashboard .
8	Click View All Settings link to access the General (user), System , and Admin Settings (administrators only).

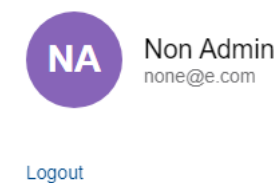
Figure 3-14: Quick Display Settings (part 2 of 2)



3.7.6 Show User Profile and log out

When you click the (NA) initials icon on the User Toolbar, you display (a) the Username, (b) the user email address, and (c) a link to log out of the Plantweb Optics Portal.

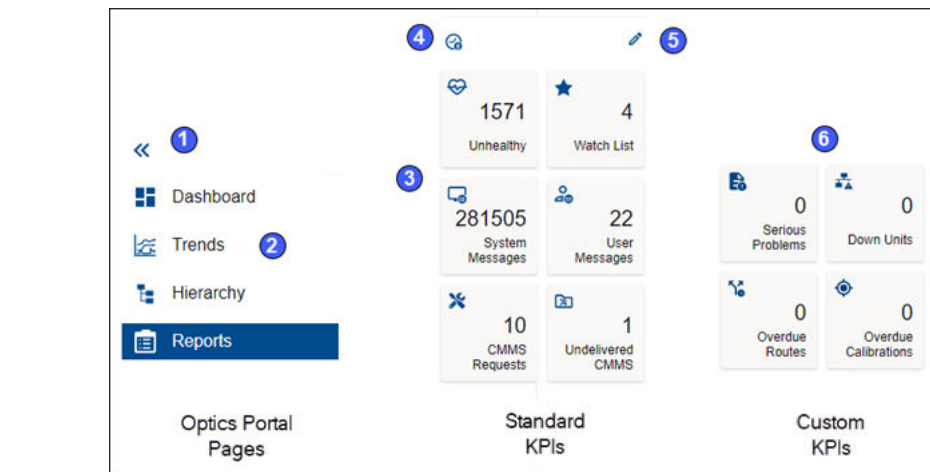
Figure 3-15: User Profile and Logout link



3.8 Left pane settings

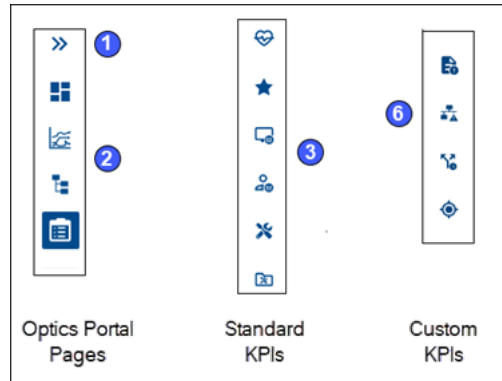
Use the left pane settings to conserve screen space on Plantweb Optics Portal application. Display text and icons or, alternatively, just the icons that signify the four key Optics Portal pages and KPI List Views.

Figure 3-16: Left Pane settings (text and icons)



Legend	Description
1	Click (◀) icon to display icons. Click (▶) icon to display text, KPI tiles, and icons.
2	Display one of Optics Portal key pages.
3	Standard KPIs
4	Hover over to see time since last Dashboard update.
5	Click to pin (📌) or unpin (📌) KPI tiles to the Dashboard .
6	Custom KPIs (dependent on Plantweb Optics Connectors)

Figure 3-17: Left Pane settings (icons only)



4 Trends graph

Plantweb Optics displays the current health and parameter values for each asset. However, it is often helpful to see how the health values change and trend over time. The **Trends** graph provides you the controls to work with your assets' historical data to analyze data trends.

The Trends graph provides

- Health and asset parameter histories, that can show possible asset problem causes
- Historical health value comparisons, including comparisons between different asset types.
- A flexible display to create accurate presentations (meetings and co-worker discussions).

These features allow you to:

- View historical data for asset parameters
- Measure the value of investments made towards maintaining asset health.
- Extract analytic information and anticipate future maintenance events and cost.

A Plantweb Optics Portal page displays up to seven asset parameters (can be from different assets). The **Trends** graph shows the saved (maximum of 365 days) parameter values and health as raw data and aggregated curves. Use the **Trends** graph to display from one week to one year of information, while comparing asset functionality. You can also export the displayed parameter values to a CSV (spreadsheet) file.

Figure 4-1: Trends graph example



Legend	Description
1	Select date range of asset parameters (health) and limits to display.
2	Quick selection of a standard display interval.
3	Aggregation method used to compute values and construct plot lines (Raw, Average, Max, Best Fit, or Interpolated).
4	Refresh the display.
5	Enlarge, decrease, or reset the chart magnification.
6	Move the Trends graph forward or backward one week, through the data interval.
7	Export Trends values to a CSV (spreadsheet) file.
8	Plotted asset parameter or health values that are connected by a trend line (3–defined using the aggregation method selector).
9	Slide the data picker to list the plotted asset parameter (health) name, units, and value for a day.
10	Use sliders to select which portions of the data to display. Adjust the sliders with your cursor to change the time range and the y-axis start and end values.

5 Asset Hierarchy

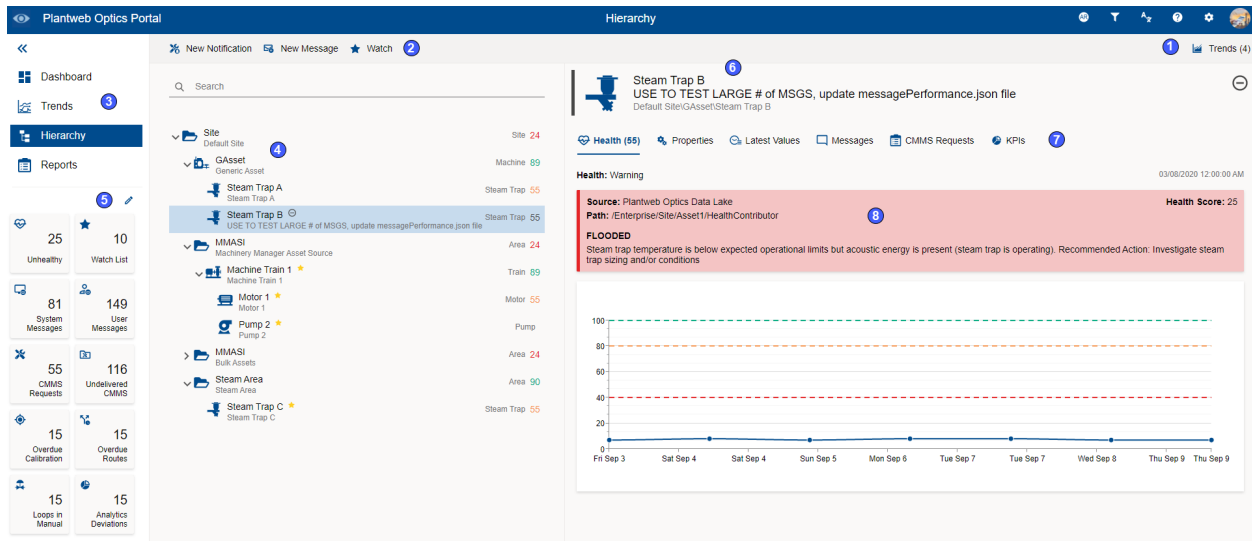
Shows the asset hierarchy for the your area of responsibility (assets that you have permissions to change). The objects follow the ISA-95 Equipment model and consist of asset and location types.

The **Hierarchy** page displays:

- **Hierarchy**–the logical organization of assets can be used to determine how an asset's health impacts other assets.
- **Preconfigured KPIs**–assets with a current health score of less than 80, user-designated assets (watch list) to observe closely, and CMMS work requests submitted to SAP or Maximo.
- **Custom KPIs** (dependent on connected data sources)–Overdue calibrations, Serious Problems, Down Units, Overdue Routes, etc.

The **Hierarchy** page also enables you to send, receive, and view messages generated in Plantweb Optics Portal. The ability to receive and display messages depends on the your area of responsibility and message filtering.

Figure 5-1: Plantweb Optics Portal Hierarchy example



Legend	Description
1	Settings (⚙️) icon and number of asset parameters plotted on Trends (📈) graph.
2	<i>Asset Ribbon Features</i> found on the Hierarchy and KPI List Views. The features can create a new notification, create a new message, add or remove a Watch List asset, and can export asset (and message or CMMS request information) to a CSV file.
3	Left panel that helps you quickly switch between main displays and selects specific KPI List Views.

Legend	Description
4	Logical organization of locations, assets, and machines according to the ISA-95 Equipment Model.
5	Edit (✎) icon that helps you display or hide KPI List Views.
6	Asset header information—name, description, and path in the logical hierarchy.
7	Dialog tabs that display on the Hierarchy and KPI list views, and include specific asset details (Health , Properties , Latest Values (if acquired), Messages , CMMS Requests , and KPIs). See Related information for details.
8	Details for the specific dialog tab.

Note

You can send, receive, and view the same messages on a mobile device if the Plantweb Optics Mobile App is installed. The Plantweb Optics Mobile App is available for download from the Google Play™ store or the Apple® AppStore™. To use the mobile app, you need a mobile join key that is associated with your account. Refer to the *Plantweb Optics System Guide* for instructions on how to download and install the Plantweb Optics Mobile App.

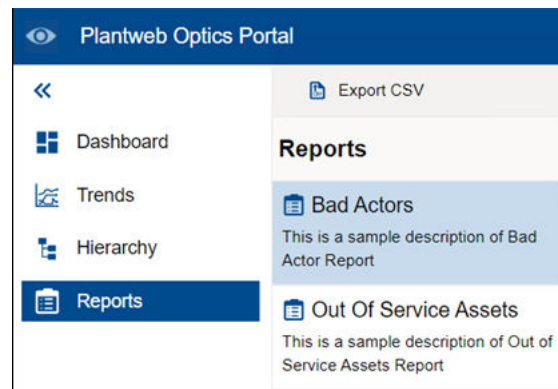
6 Reports

Plantweb Optics Portal displays asset information reports on the **Reports** page. The key problem assets are displayed in a columnar format. Each column in the reports can be used to sort the table in ascending or descending order. The data listed in each report can be exported to a spreadsheet-formatted *.csv file.

Currently, Plantweb Optics Portal has these reports:

- **Bad Actors Report**—filtered to show only poor performing assets from the previous 7, 30, 60, or 90 days.
- **Out of Service Assets Report**—For all ignored assets or for a specific scheduled event (maintenance period, turn-around, etc.).

Figure 6-1: Reports page example



6.1 Bad Actors Report

Similar to the **Bad Actors** display on the **Dashboard**. You can switch the evaluation interval from 7 to 30, to 60, or to 90 days. You can export the asset information to a comma-separated value (spreadsheet) file.

The report describes assets with frequent warnings and that create numerous events. Your Plantweb Optics Administrator sets the criteria for all Bad Actor assets in the **Bad Actors System Settings**, for your Plantweb Optics installation.

Figure 6-2: Bad Actors Report

Bad Actors											
Asset Name ^	Number of E...	Event	Current Health	Days Since ...	Criticality	Area	Manufacturer	Model	Serial Number	Tag	Last Health
3051 -01	2	Device Alert ...	0	-1	100005	FF	Rosemount	3051	00115130510...	3051 -01	02/15/2022
3051 -01	2	Device Alert ...	0	-1	100005	FF	Rosemount	3051	00115130510...	3051 -01	02/15/2022
3051 -01	1	Device Alert ...	0	-1	100005	FF	Rosemount	3051	00115130510...	3051 -01	02/15/2022 7:...
3051 -01	1	Work Notifica...	0	-1	100005	FF	Rosemount	3051	00115130510...	3051 -01	02/15/2022 7:...
3051 -02	3	Device Alert ...	0	-1	0	FF	Rosemount	3051	00115130510...	3051 -02	02/15/2022 7:...
3051 -02	1	Device Alert ...	0	-1	0	FF	Rosemount	3051	00115130510...	3051 -02	02/15/2022 7:...

Legend	Description
1	Bad Actors assets initially display for a default evaluation interval (defined by Administrator).
2	Select amount of evaluation interval. Choose the previous 7, 30, 60, or 90 days of Bad Actor assets. Your setting persists in the browser cache.
3	Click any asset column title to sort the table in ascending (^) or descending (v) order.

6.2 Out Of Service Assets Report

This report shows a list of assets in which Plantweb Optics Portal ignores the unhealthy status plus any system-generated messages, for a specific scheduled interval. The displayed assets are filtered based on the current Active filter. You can also export the information to a CSV (spreadsheet) file.

The report shows a list of ignored assets for:

- All currently out of service assets, or
- Any scheduled event (maintenance). The schedule displays along with the list of out of service assets.

Figure 6-3: Out of Service Assets Report example

Plantweb Optics Portal
Reports

Export CSV

Reports

Bad Actors
Assets associated with frequent failures and that create numerous events.

Out Of Service Assets
Assets set to ignore their unhealthy status and any generated system messages

Out Of Service Assets

current

Schedule 1
Yearly
Starts 02/16/2022

Schedule 2
Monthly
Starts 02/16/2022

Schedule 3
Yearly
Starts 02/16/2022

Asset	Description	Path	Schedule
3051 -04		/Enterprise/Site/TEVW10TH2-DMS04/Area/U...	Starts 02/16/2022 12:00:00 AM
3051 -03		/Enterprise/Site/TEVW10TH2-DMS04/Area/U...	Starts 02/16/2022 12:00:00 AM

Legend	Description
1	Out Of Service Assets report selected
2	The current schedule is the default. (The schedule shows all assets, including those manually taken out of service.)
3	Alternatively, select a schedule. The schedule displays its name, recurrence rate, start time stamp, and final time stamp (when defined).
4	Assets assigned to the selected schedule.
5	Click any asset column title to sort the table in ascending (▲) or descending (▼) order.
6	For a named schedule, the start time and end time.

7 KPI List views

Display Key Performance Indicators (KPIs) for plant assets and Custom KPIs that use Plantweb Optics Connectors.

The KPIs include:

- Unhealthy
- Watch List
- System Messages
- User Messages
- CMMS Requests
- Undelivered CMMS
- Custom KPIs—such as Overdue Routes, Serious Problems, Overdue Calibration, and Loops in Manual

Pin (📌) or unpin (📌) a KPI from the **Dashboard** page using the left pane settings.

Display or hide KPIs by using the Quick Display Settings (**Displayed KPIs Setting** check boxes). See Related information for details.

Search any KPI List view asset list using asset identification values (name, description, or path).

Sort assets in the KPI List Views.

7.1 Hide and display KPI List Views

The Plantweb Optics Portal application displays Key Performance Indicators using a KPI Tile (a square with an icon, text, and a count of the number of indicators) and a list of assets. Any KPI list of assets can be sorted and searched.

The Dashboard has three types of KPI List Views:

- **Permanent**—Four KPIs that always display and cannot be hidden; Unhealthy (📌), Watch List (★), System Messages (📌), and User Messages (📌).
- **Work Request**—The CMMS Requests (📌) KPI and the Undelivered CMMS (📌) KPI.
- **Custom**—Additional indicators that obtain asset information from Plantweb Optics Connectors. These can be Emerson Connectors (such as AMS Device Manager) or Open Standards and Protocols connectors (such as an OPC UA Server).

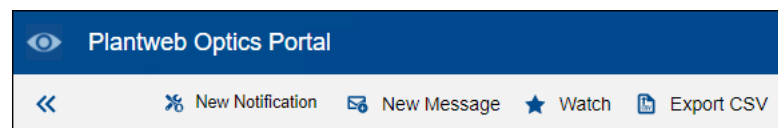
Hide or display the Work Request KPIs and the Custom KPIs using these methods:

- **Left pane controls**—Click the show (») icon, followed by clicking the edit (✎) icon.
- **KPI check boxes**—Click the Gear (⚙️) icon in User Toolbar. Select or clear the **Displayed KPIs** check boxes.

7.2 Asset ribbon features

Near the Optics Portal Page title bar for **Hierarchy** and KPI List Views, are specific commands that you can use whenever an asset is selected.

Figure 7-1: Asset ribbon feature example



Note

To see all the commands, you must first select an asset in the list or hierarchy.

Table 7-1: Commands for Hierarchy and KPI List Views

Optics Portal Page	Asset Ribbon Features
Hierarchy	New Notification ¹ , New Message, Watch and Unwatch
Unhealthy KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
Watch List KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
System Messages KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
User Messages KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
CMMS Requests KPI	New Notification ² , New Message, Watch and Unwatch, Export CSV
Undelivered CMMS KPI	New Notification ² , New Message, Watch and Unwatch, Export CSV
Custom KPIs	New Notification ¹ , New Message, Watch and Unwatch, Export CSV

¹ Displays when (a) you select an asset, (b) your user ID has the permission to "Create Work Notifications, and (c) the selected asset has an Asset Code. Display the asset **Properties** tab and click **CMMS** to display the Asset Code. See Related information for details.

² Displays when (a) you select an asset and (b) your user ID has the permission to "Create Work Notifications."

7.2.1 Search KPI List View and Hierarchy assets

The asset **Hierarchy** and KPI List Views can be searched using asset header identification and the message subject:

- Message Subject (**System Message KPI** and **User Message KPI**)
- Asset Name

- Asset Description
- Asset Path

Figure 7-2: Search function

name:Machine1 AND message:"Western Refinery"

Filter

name: Asset Name

description: Asset Description

path: Asset Path

message: Message Subject

Operators

AND OR Close

Note

Use **AND** and **OR** Boolean operators to make more complex searches that use multiple fields. When using multiple operators, the **AND** operation takes precedence.

Note

Enclose your search string in double quotes when searching with a field containing blank spaces (for example "West Refinery").

Note

Include the forward slashes when searching the asset **path**, (that is, Enterprise/Site/Machine1).

Procedure

1. Select a KPI List view or the **Hierarchy** (🗺️) page.
2. Click the (🔍) **Search** area .
3. Click an (asset) **name**, **description**, **message**, or **path** field name.
4. Type your search string after the field name colon (:). Start and end the string with (") straight quotes when your search string contains spaces.
5. **[Optional]** Click **AND** or **OR** in the search dialog for more complex searches.
6. **[Optional]** Click an (asset) **name**, **description**, **message**, or **path** field you *did not* use in step three.
7. **[Optional]** Type a second search string for the field in Step six. Use quotes when necessary.
8. Press **[Enter]**.

Note

The search returns the assets that are preloaded when you clicked the KPI tile. When the search result returns an empty list, the assets (that satisfy the search) are not loaded in the Optics Portal client. Click the **Load more results...** link to fetch the assets from the Data Repository.

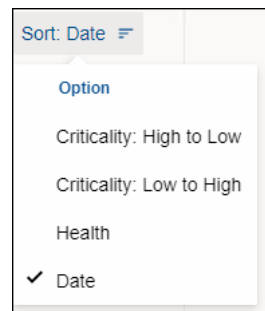
9. Click **Close**.

7.2.2 Sort KPI List View assets

Display KPI List View assets using one of these sorting options:

- Criticality: High to Low
- Criticality: Low to High
- Health (score)
- Date (most recent to older)

Figure 7-3: Asset sorting options



For assets, Plantweb Optics Portal uses these default **Sort** options for the *initial* display:

- **Unhealthy** and **Watch List** KPIs–Health.
- **System Messages** and **User Messages** KPIs–Date.
- **CMMS Requests** and **Undelivered CMMS** KPIs–Date.
- **Custom** KPIs–Date.

Procedure

1. Select a KPI icon or the KPI tile.
2. Select one of the options in the **Sort** drop-down list:
(a) **Criticality: High to Low**, (b) **Criticality: Low to High**,
(c) **Health**, or (d) **Date**

The asset list sorts according to your selection.

7.3 Unhealthy KPI

Display all under-performing (Critical and Warning health classifications) assets. The **Health** 7-day graph shows the health score recorded for the previous seven days. This list of assets is (a) composed of assets with Critical and Warning health classifications, (b) excludes out of service assets, (c) is filtered based on the current Active Filter, and (d) includes only Asset Type objects.

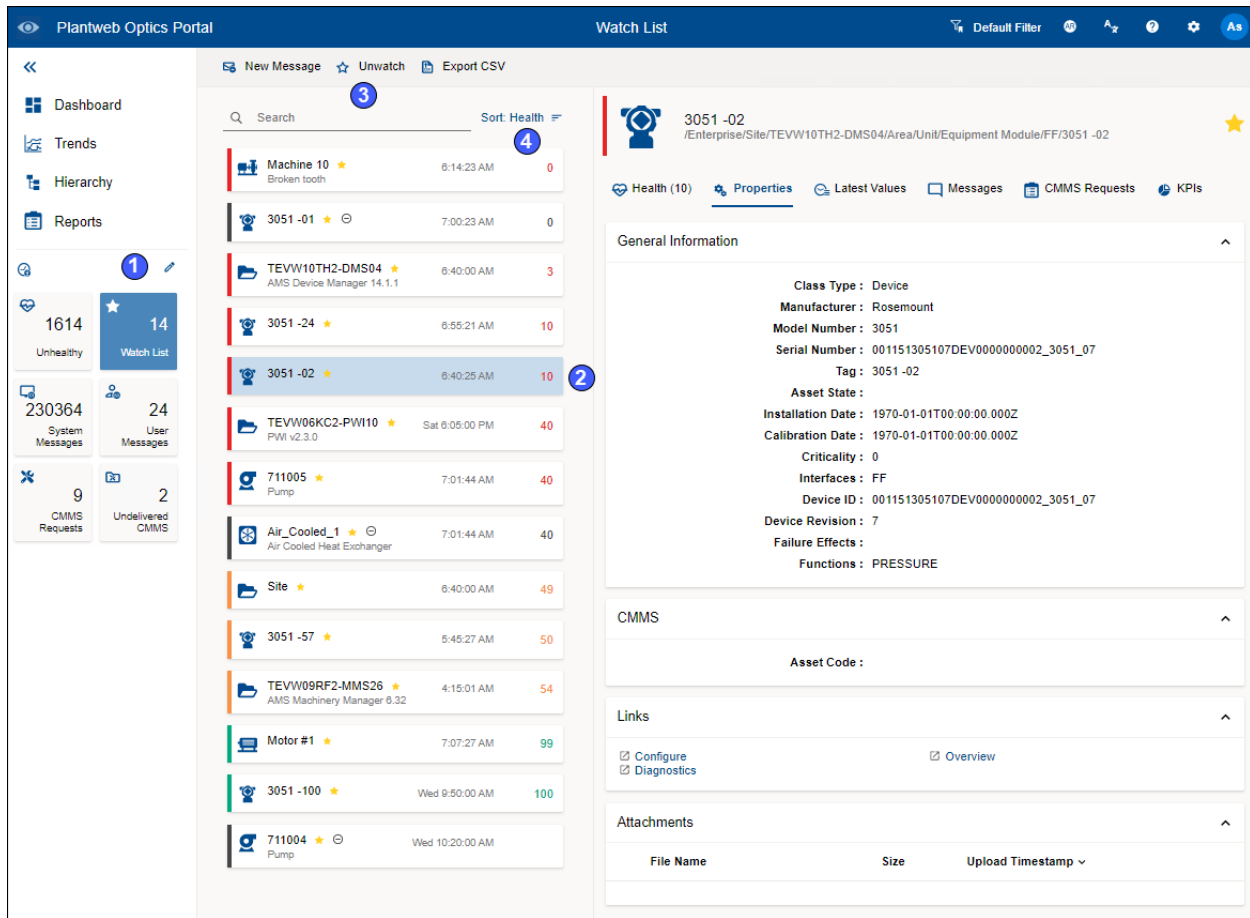
Figure 7-4: Unhealthy KPI

Legend	Description
1	Selected KPI
2	Selected asset
3	Asset ribbon features
4	Select KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent to older).
5	Click the (^) icon to hide and click the (v) icon to display parameter grouping.

7.4 Watch List KPI

Select assets to monitor for health and performance. Select any assets from within your area of responsibility for the **Watch List**. The KPI count and asset list is filtered by the current Active Filter. Both asset and location class types display for the **Watch List** KPI.

Figure 7-5: Watch List KPI



Legend	Description
1	Selected KPI
2	Selected asset
3	Asset ribbon features
4	Selected KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent first).

7.5 System Messages KPI

System Messages created by the Plantweb Optics Portal or Plantweb Optics Connectors. The **Message Filter** replaces the Message subscription concept in previous software releases. The **Message Filter** (configured in your Optics Portal **General Settings**) is applied to your assets when you display this KPI.

- Count of messages coming into the Optics Portal from Data Sources and CMMS work request events.


- List of Assets and Locations with system messages.
- Filtered based on your current Active Filter.
- Configure your Message Filter using the **Settings** page (**General** area). See Related information for details.
- Tool tip for this KPI indicates the evaluation interval (previous 7, 30, 60, or 90 days) set in the **Message Filters**.
- Enable or disable the message filter in the Quick Display Settings.
- Perform any command in the Asset ribbon features: **New Notification**¹, **New Message**, **Watch/Unwatch**, and **Export CSV**.

Figure 7-6: System Messages KPI

Legend	Description
1	System message parts such as asset type, source, and asset path, plus message details.
2	Selected asset.
3	Asset ribbon features. You can create a user message for this asset and tag other users. You can create a new notification ¹ .
4	Selected KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent first).
5	Display (System) System, (User) User, or (All) All message types.
6	Message time stamp, severity, and (CMMS) icon, indicating one or more CMMS work requests.

¹ Displays when (a) you select an asset, (b) your user ID has permission to "Create Work Notifications, and (c) the selected asset has an Asset Code. Display the asset **Properties** tab and click **CMMS** to display the Asset Code.

Note

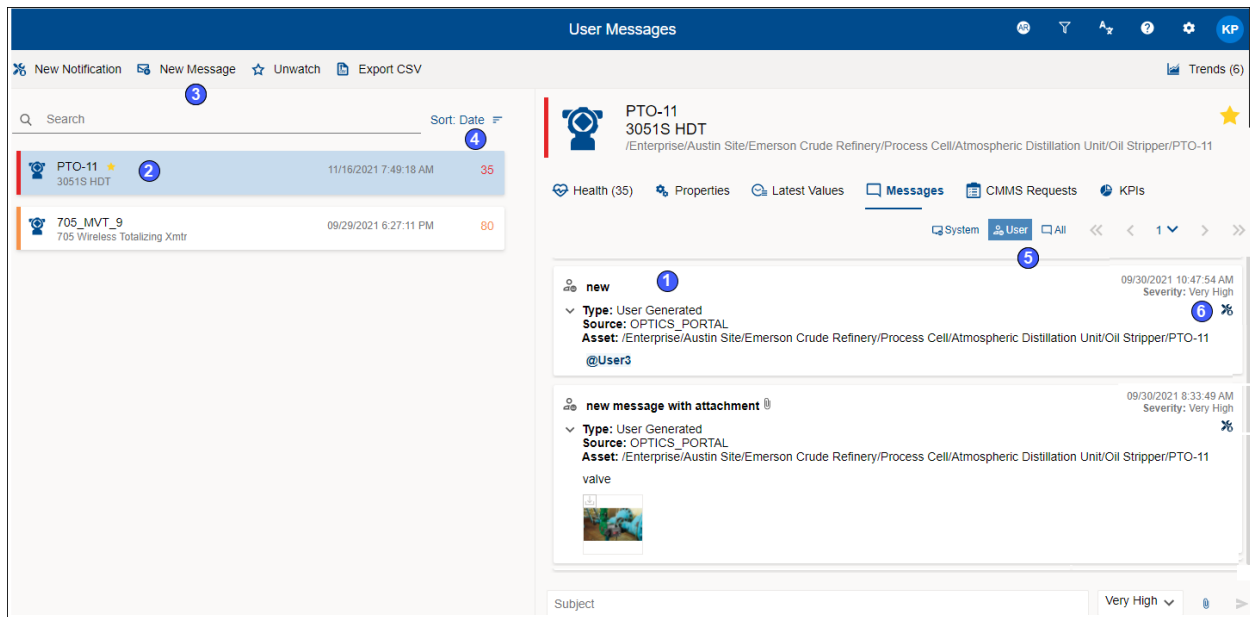
Enable or disable the **Message Filter** under the Quick Display Settings. Click the  icon in User Toolbar. Turning Off the message filter *displays all the messages* and mimics what the event viewer displayed in previous Plantweb Optics software.

7.6 User Messages KPI

The **User Message** KPI includes:

- Count of user messages.
- List of Assets and Locations with user messages.
- Assets filtered based on the currently Active Filter.
- Configure your Message Filter using the **Settings** page (**General** area). See Related information for details.
- Asset list includes out of service assets.
- Perform any commands in the asset ribbon features: **New Notification**¹, **New Message**, **Watch/Unwatch**, and **Export CSV**.
- Tool tip (hover over KPI tile) indicates the number of previous days set in the **Message Filters** settings.

Figure 7-7: User Messages KPI



Legend	Description
1	System message parts such as asset type, source, and asset path, plus message details.
2	Selected asset.

Legend	Description
3	Asset ribbon features. You can create a user message for this asset and tag other users. You can create a new notification ¹ .
4	Selected KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent first).
5	Display (📧) System, (👤) User, or (🗉) All message types.
6	Message time stamp, severity, and (🔊) icon, indicating one or more CMMS work requests.

¹ Displays when (a) you select an asset, (b) your user ID has the permission to "Create Work Notifications, and (c) the selected asset has an Asset Code. Display the asset **Properties** tab and click **CMMS** to display the Asset Code.

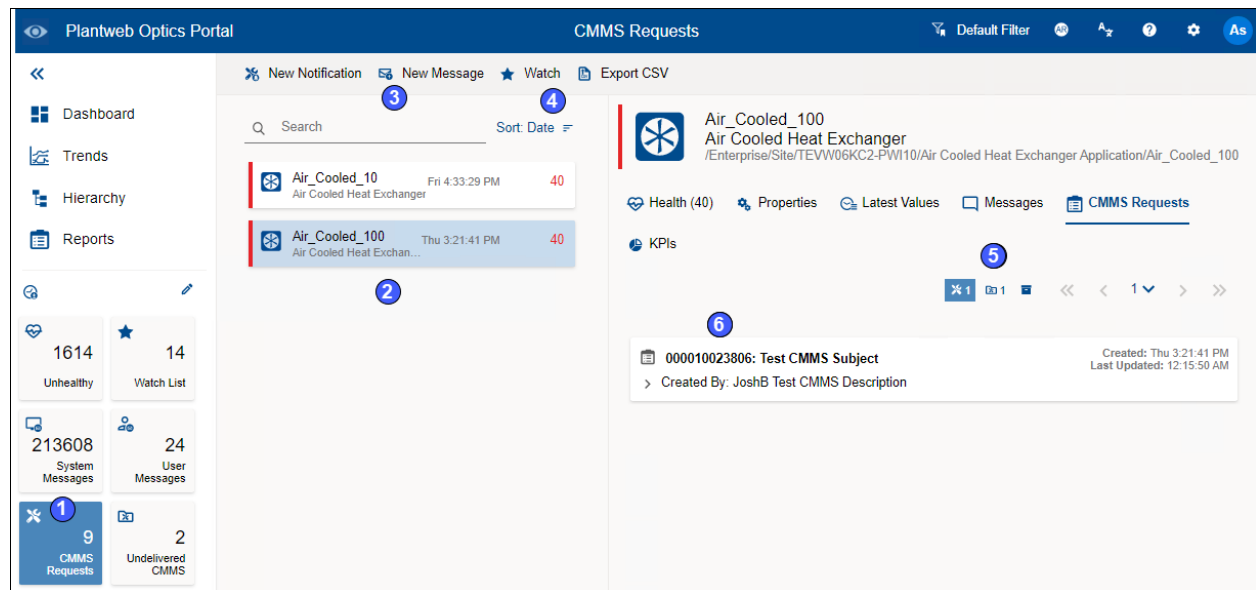
Note

You can enable or disable the **Message Filters** under the Quick Display Settings. Click the (🗑️) icon in the User Toolbar.

7.7 CMMS Requests KPI

The count of Open CMMS work requests, plus a list of the assets that generated the requests. The assets displayed are filtered based on the current Active Filter. The KPI includes asset and location types, plus out of service assets.

Figure 7-8: CMMS Requests KPI



Legend	Description
1	Selected KPI

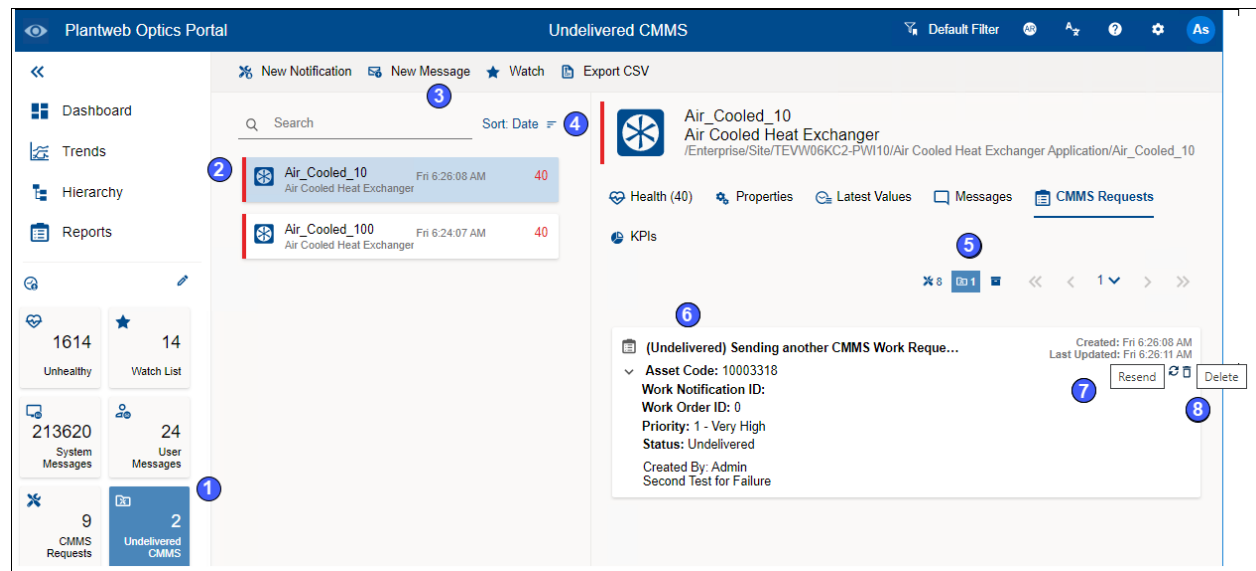
Legend	Description
2	Selected asset
3	Asset ribbon features. Create a user message for this asset and tag other users. You can create a new notification ¹ .
4	Selected KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent first).
5	Filter work requests by status: (x) Open, (u) Undelivered, and (c) Closed or Canceled.
6	Work request details.

¹ Displays when (a) you select an asset and (b) your user ID has the permission to "Create Work Notifications."

7.8 Undelivered CMMS KPI

Count of Pending and Undelivered work requests, plus the list of assets associated with the work requests. The KPI list includes asset and locations. Resulting assets are filtered based on the current Active Filter.

Figure 7-9: Undelivered CMMS KPI

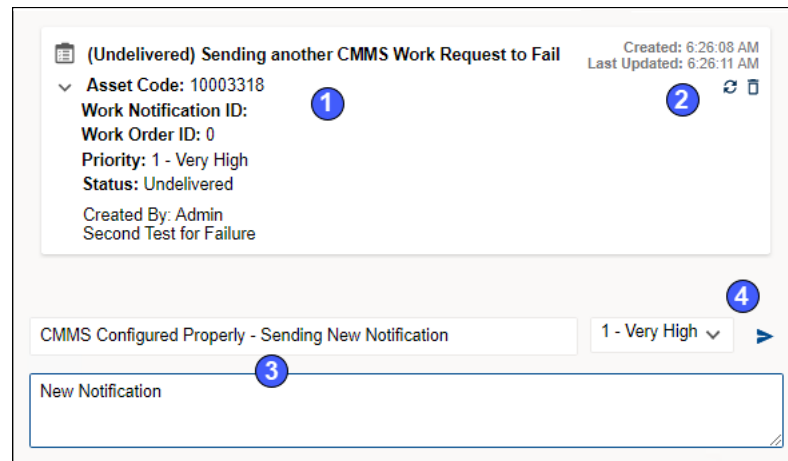


Legend	Description
1	Selected KPI
2	Selected asset
3	Available asset ribbon features. Create a user message for this asset and tag other users. You can create a new notification ¹ .

Legend	Description
4	Selected KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent first).
5	Filter work requests by status: (x) Open, (u) Undelivered, and (c) Closed or Canceled.
6	CMMS request details.
7	Resend the work request.
8	Delete the work request.

¹ Displays when (a) you select an asset and (b) your user ID has the permission to "Create Work Notifications."

Figure 7-10: New Notification example



Legend	Description
1	Original work request details.
2	Resend and delete work request controls
3	New notification subject and details.
4	CMMS work priority assigned and the send control.

7.9 Custom KPIs

The Custom KPI count depends upon the type of Custom KPI registration done when you add the asset source.

Registrations can be:

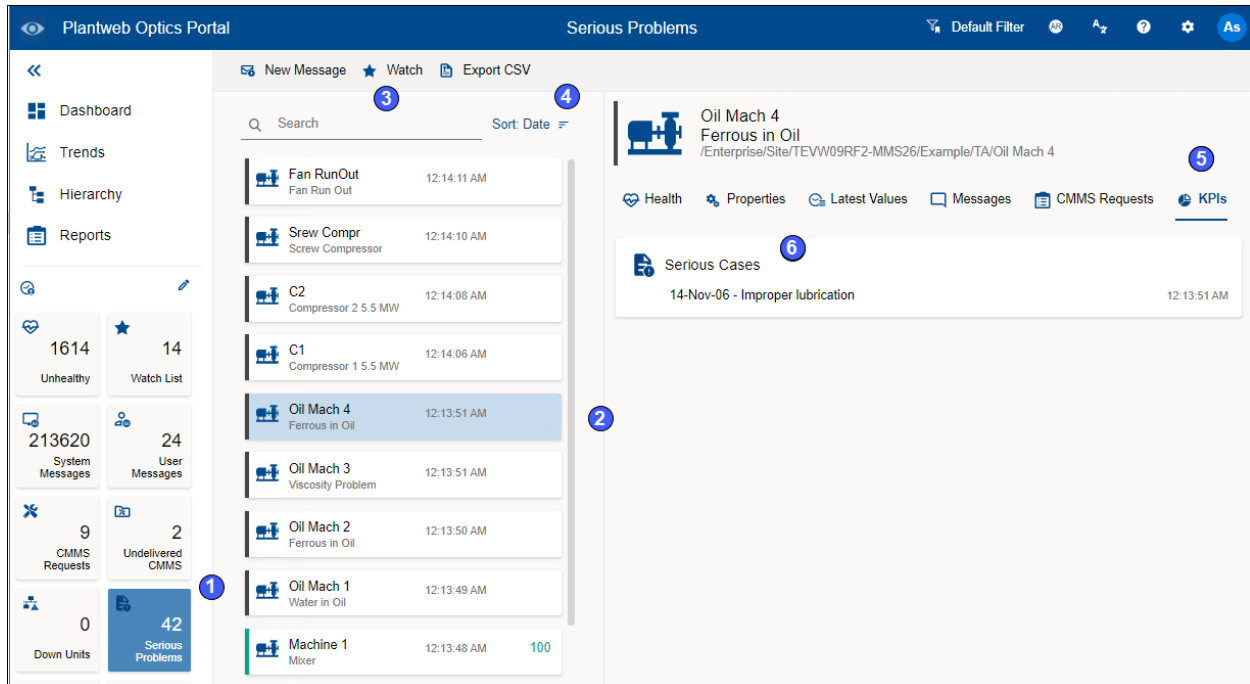
- **by Assets**—number of assets with contributors.
- **by Contributors**—number of contributors.

- **by Value**—the value passed to Plantweb Optics when the Plantweb Optics Connector registers the Custom KPI.

The resulting list has contributors and is filtered based on your current Active Filter.

Custom KPI examples include **Down Units**, **Overdue Routes**, **Serious Problems**, **Overdue Calibration**, **Loops in Manual**, and **Analytics Deviations**.

Figure 7-11: Custom KPI example



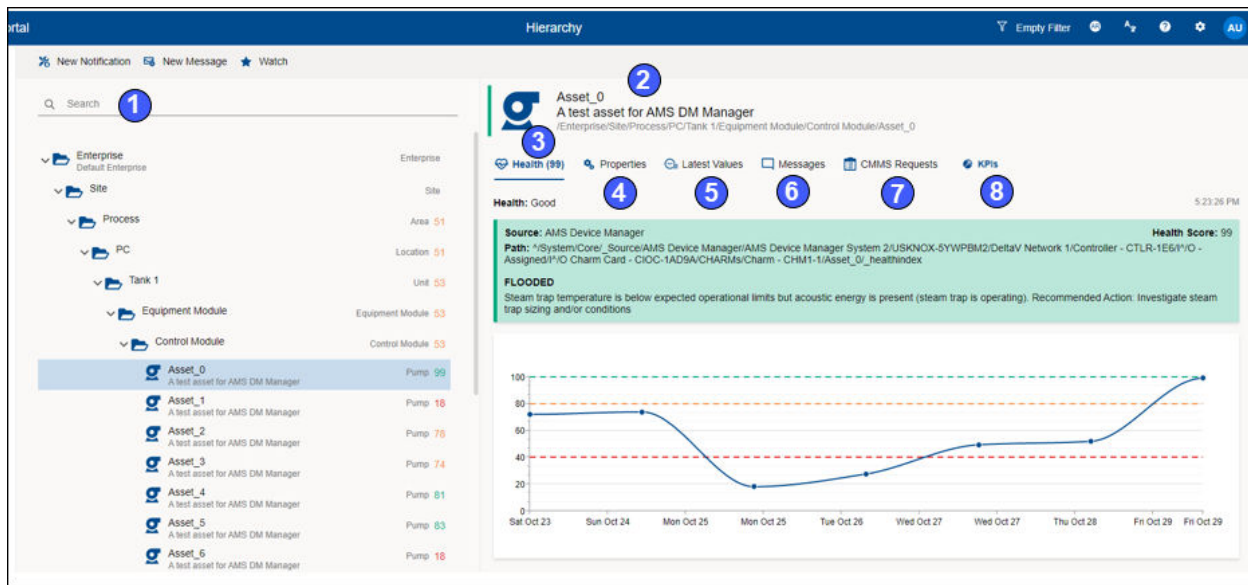
Legend	Description
1	Selected KPI
2	Selected asset
3	Asset ribbon features. Create a user message for this asset and tag other users. You can create a new notification ¹ .
4	Selected KPI sorting option. Sorting options are (a) Criticality: High to Low, (b) Criticality: Low to High, (c) Health (low to high), or (d) Date (most recent first).
5	Display KPI for this asset.
6	Custom diagnostic information provided by Plantweb Optics Connector.

¹Displays when (a) you select an asset and (b) your user ID has the permission to "Create Work Notifications."

8 Asset information

Plantweb Optics Portal displays an extensive amount of information for each asset.

Figure 8-1: Asset information

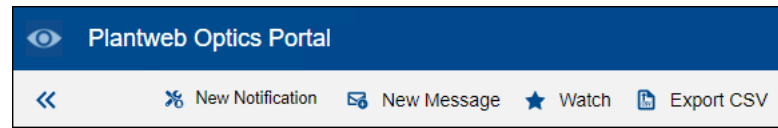


Legend	Description
1	Asset elements —the asset Hierarchy and the search function, health trend, dialog tabs, and filters that organize and define the following displayed seven sets of asset information.
2	Basic asset header —information such as health color-coded bar, asset name, asset description, hierarchy path, Watched icon, and Out of Service icon.
3	Health tab —shows asset's current health information.
4	Properties tab —provides asset details, links to other information, attachments (pics, docs, procedures), including the Asset Code (CMMS ID) that would be used in a work request.
5	Latest Values tab —asset parameters such as temperature and pressure.
6	Messages tab —user generated, system-generated (events), or both. User can customize the message filter. Your administrator defines the Severity levels.
7	CMMS tab (work requests) —work title includes the Work Notification ID prefix, priority, request Status, and work details.
8	KPIs tab —displays all the custom KPIs for asset (if present).

8.1 Asset ribbon features

Near the Optics Portal Page title bar for **Hierarchy** and KPI List Views, are specific commands that you can use whenever an asset is selected.

Figure 8-2: Asset ribbon feature example



Note

To see all the commands, you must first select an asset in the list or hierarchy.

Table 8-1: Commands for Hierarchy and KPI List Views

Optics Portal Page	Asset Ribbon Features
Hierarchy	New Notification ¹ , New Message, Watch and Unwatch
Unhealthy KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
Watch List KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
System Messages KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
User Messages KPI	New Notification ¹ , New Message, Watch and Unwatch, Export CSV
CMMS Requests KPI	New Notification ² , New Message, Watch and Unwatch, Export CSV
Undelivered CMMS KPI	New Notification ² , New Message, Watch and Unwatch, Export CSV
Custom KPIs	New Notification ¹ , New Message, Watch and Unwatch, Export CSV

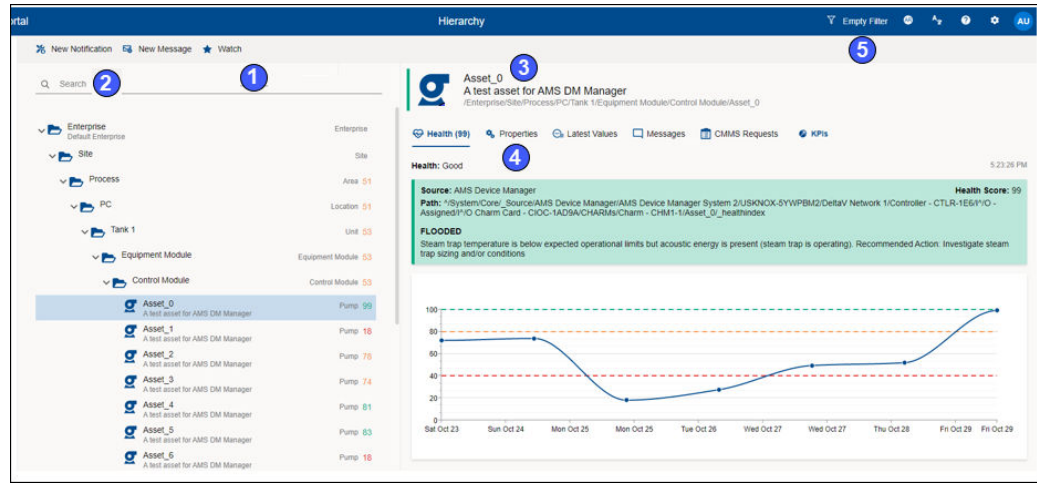
¹ Displays when (a) you select an asset, (b) your user ID has the permission to "Create Work Notifications, and (c) the selected asset has an Asset Code. Display the asset **Properties** tab and click **CMMS** to display the Asset Code. See Related information for details.

² Displays when (a) you select an asset and (b) your user ID has the permission to "Create Work Notifications."

8.2 Asset elements

Plantweb Optics Portal has five major functions that display or hide (restrict or filter) asset information.

Figure 8-3: Access elements



Area	Function	Description
1	Area of responsibility (unseen)	Parts of the asset hierarchy in which you are permitted to have full control, restricted functions, or display-only access. These areas are defined by the Plantweb Optics Access administrator, who assigns you permissions (<i>Write, Modify, Execute, List¹, Read, and Inheritable²</i>). Any asset filtering begins first with filtering the list of assets against your assigned permissions. Note You would see this asset hierarchy if no event or message filters are defined.
2	Search function	You can find specific assets using a text search on specific asset header information.
3	Asset Header	Basic asset identification and potential health issues at a glance.
4	Dialog tabs	For each asset, these tabs organize and display specific asset information. See individual tabs for specific information items. See Related information for details.
5	Filters	You can use a filter, edited by you, or a filter defined by the administrator for all Plantweb Optics Portal users. You can designate a filter to be (a) Active (in use and applied to the asset hierarchy) or (b) the Default Filter, which cannot be deleted until another User Filter is designated.. You can save a maximum of ten User Filters.

¹If set to true the object displays when listing children of its parent, also the ancestors of the object can be listed.

²Explicit permissions set for this object are inherited by all its children.

8.2.1 Basic asset header

The asset header provides basic asset identification and displays potential asset issues at a glance.

Figure 8-4: Asset header



Area	Feature	Description
1	Health bar	<ul style="list-style-type: none"> Red–Critical Orange–Warning Green–Good Gray–Unknown or asset is Out of Service
2	Asset Name	Name of the Asset or can be the CMMS Asset Tag
3	Asset Description	Long name of the Asset
4	Hierarchy Path	Asset’s location in the ISA-95 Equipment hierarchy
5	Watched icon	Displays (★) icon beside an asset you designated for your Watch List .
6	Out of Service icon	Displays ☹ icon when an asset is ignored for health calculations and system messages.

8.2.2 Asset hierarchy search

The asset Hierarchy can be searched using asset header identification fields:

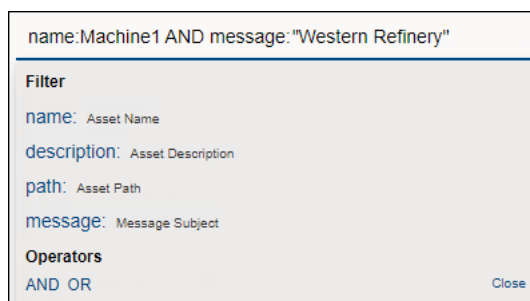
- Asset Name
- Asset Description
- Asset Path

For searches using **System Message** or **User Message** KPI List Views, you can search by message **Subject**.

Note

When your search returns more than 100 assets, retrieve more assets by clicking the **Load More Assets** link at the bottom of the asset list.

Figure 8-5: Asset hierarchy search function



Note

Use the **AND** and **OR** Boolean operators for more complex searches that require multiple asset fields.

Note

When searching a field with blank spaces, enclose your string in double quotes (that is, "West Refinery").

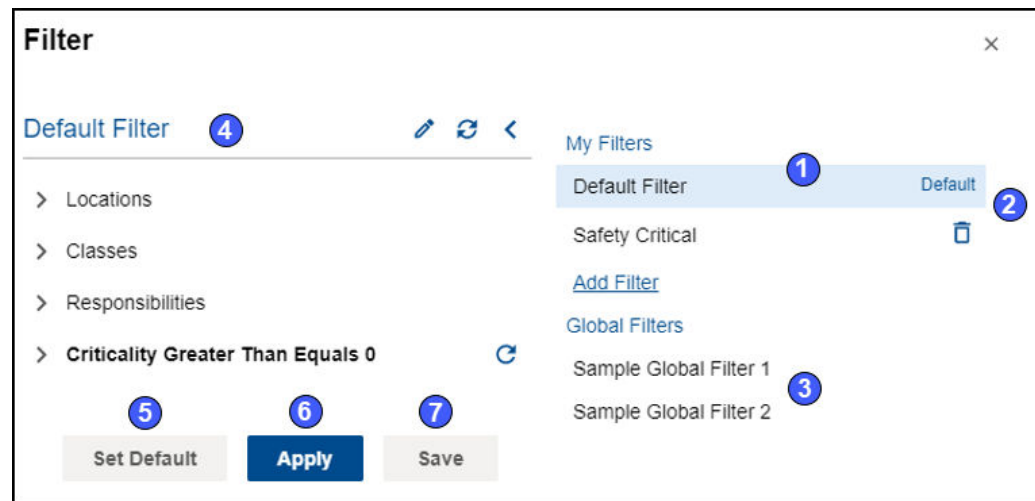
Note

When searching the **Asset Path**, include the forward slashes (that is, Enterprise/Site/Machine1).

8.2.3 Asset filter types

Use the Active, Default, User, and Global Filter types to select the assets you monitor and study. Your filtering criteria includes device-type, hierarchy area, responsibilities (Failure Effects, Functions, and Interfaces), and criticality.

Figure 8-6: Filter dialog



Legend	Feature	Description
1	Default Filter	Click Set Default to prevent this filter from deletion. The word Default identifies your selection..
2	User Filters	Created by you; up to ten User Filters can be saved under My Filters .
3	Global Filters	Filters created for all users by a Plantweb Optics administrator, which are saved under Global Filters . You can load a Global Filter's specifications, but you can only save changes as a <i>new</i> User Filter name.

Legend	Feature	Description
4	Active Filter	Filter applied to the asset Hierarchy , Dashboard displays, and KPI List Views, when you click Apply . The filter is saved in the browser cache as your Active Filter and its name displays in the User Toolbar.
5	Set Default	Click to designate these filter settings as the Default Filter . The filter name has the word <i>Default</i> beside its name. This filter cannot be deleted until another User Filter is designated as the default filter.
6	Apply	Designate the selections (Locations, Classes, Responsibilities, and Criticality) as the Active Filter . Applied to all displays, except the Hierarchy search. Active filter saved in the browser cache.
7	Save	Retains selections for a User Filter. When the settings begin with a Global Filter, you must save the filter with a <i>new</i> name.

Note

With no filter specifications applied, Plantweb Optics Portal displays every asset in the hierarchy for which you have permissions.









8.3 Dialog tabs for asset information

Select an asset in the **Hierarchy** or in a KPI List View to display asset details. The asset dialog tabs separate the information into groups.

Figure 8-7: Asset tabs



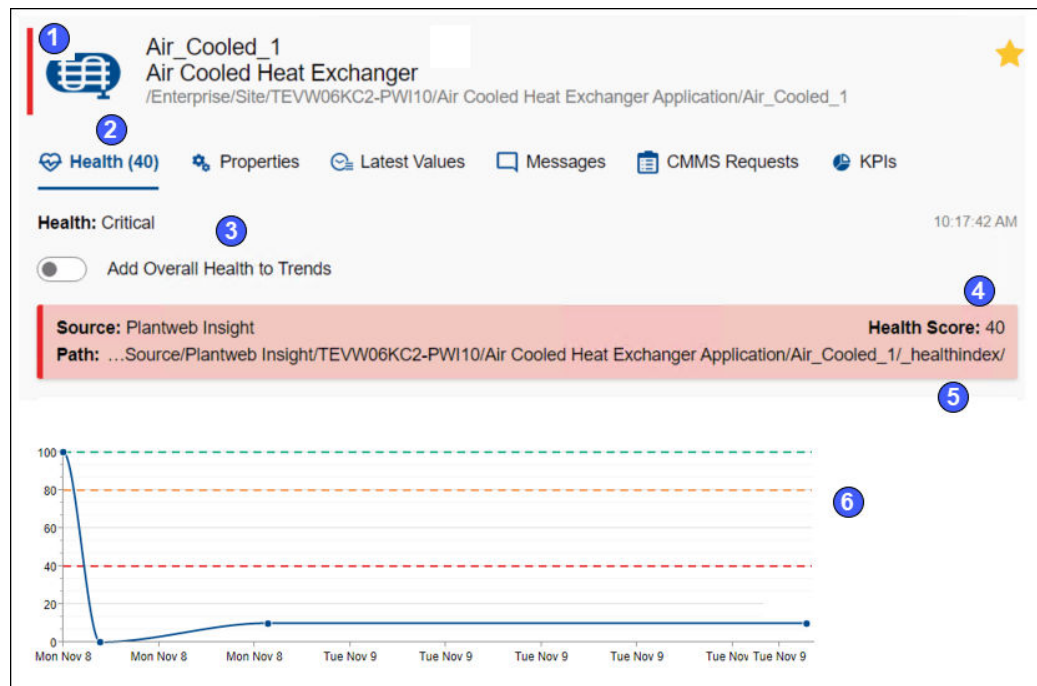
Legend	Feature	Description
1	Health	Details about the assets health and possible contributors that are failing. A switch can add previous health values to the Trends graph.
2	Properties	Locate information about the asset : <ul style="list-style-type: none"> • General asset information (asset logical path, asset description, and health score). • CMMS (Asset Code) • Links and attachments.
3	Latest Values	Find parameter limits, current parameter values, and the parameter update time stamps. Select parameters to add to the Trends graph .

Legend	Feature	Description
4	 Messages	Shows the related messages for a selected asset. Messages are organized by most current and most urgent. You can filter the messages to see System () Messages, User () messages, or All () messages, by clicking the icon. Create and send a message using the fields at the bottom of the Messages () tab.. See your Notifications displayed in the System () Messages,
5	 CMMS Requests	Open, Undelivered, Canceled, or Closed CMMS work requests. The work requests are organized in pages of 40 each, with paging controls similar to the Messages dialog tab.
6	 KPIs	Custom KPI information obtained from a Plantweb Optics Connector.

8.3.1 Health tab

The Health tab helps you quickly understand the current and previous 7-day health of an asset.

Figure 8-8: Health tab example



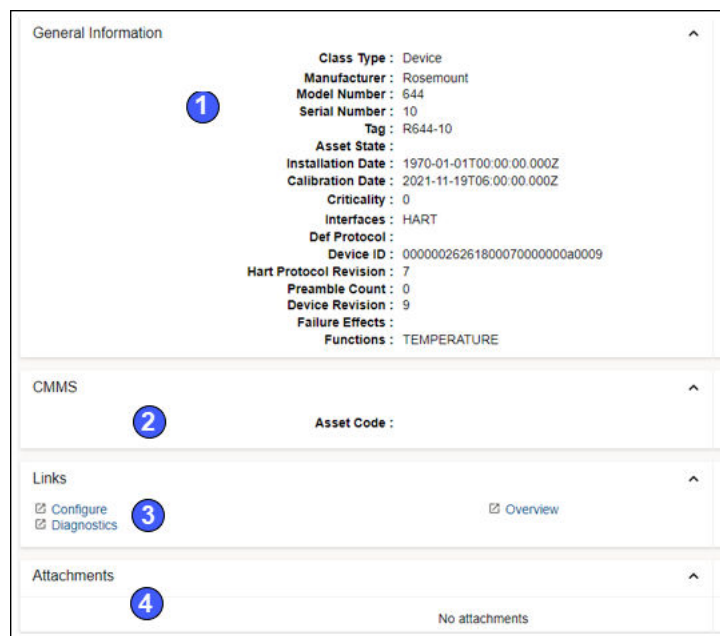
Legend	Feature	Description
1	Current health status	Critical, Warning, Good, and Other.
2	Health tab	Displays by default once you select the asset.

Legend	Feature	Description
3	Add Health to Trends	Click to display overall health score on Trends graph.
4	Last health status update	Last time that Optics Portal received the health value for asset
5	Health contributors	<ul style="list-style-type: none"> • Details related to health score from the Physical Asset that provides health information to the ISA-95 Equipment asset. • Source–data source where the health originates • Path–path of the Physical Asset that contributes the health information • Health Score–physical Asset current health • Details (Optional)–details of the reason why the health has changed
6	Seven-day running health	Health history recorded for past seven days. Individual daily health scores are aggregated using a best fit trend line.

8.3.2 Properties tab

Display additional asset details using the **Properties** tab. The dialog tab can provide detailed asset information, CMMS Asset Code used for work requests, links to related documents/images, plus attachments.

Figure 8-9: Properties tab



Legend	Feature	Description
1	General Information	Asset information regarding its type, model, protocol, function, failure effect, etc.
2	CMMS	The CMMS Asset Code used for work requests
3	Links	<ul style="list-style-type: none"> Types of links: <ul style="list-style-type: none"> Actions—launch by context URLs External Links—links for a website
4	Attachments	Files that were uploaded for the asset.

8.3.3 Latest values tab

Display parameters associated with an asset. Select a maximum of 16 parameters from multiple assets to add to the Trends graph..

Figure 8-10: Latest Values tab

The screenshot shows the 'Latest Values' tab for an asset with ID 001151305114DEV000004201. The left sidebar shows a hierarchy: Enterprise > Austin Site > AMS Device Manager Demo System 1 > Area > Unit > Equipment Module > FF. The main content area displays 'Plantweb Optics (2)' with a table of parameters:

Parameter	Limits	Values	Date/Time
<input checked="" type="checkbox"/> Pressure (PV) [Block 1100]		82.46239 PINH2O	11/02/2021 9:31:43 AM
<input checked="" type="checkbox"/> Temperature (SV) [Block 1100]		41.71664 TCEL	11/02/2021 9:31:43 AM

Legend	Description
1	Parameters grouped according to the application or data source.
2	Select check boxes under the Trends (📈) icon to add to the Trends graph.

8.3.4 Messages tab

The Plantweb Optics Portal pages display a list of messages for an asset that is selected from the **Hierarchy** or belongs to assets from a specific Key Performance Indicator (KPI). KPIs are asset (and locations) lists used to alert users to potential problems. KPIs include **Unhealthy** (assets with low health scores), **Watch List** (user selections), **System Messages**, **User Messages**, **CMMS Requests**, **Undelivered CMMS** (work requests), and Custom KPIs.


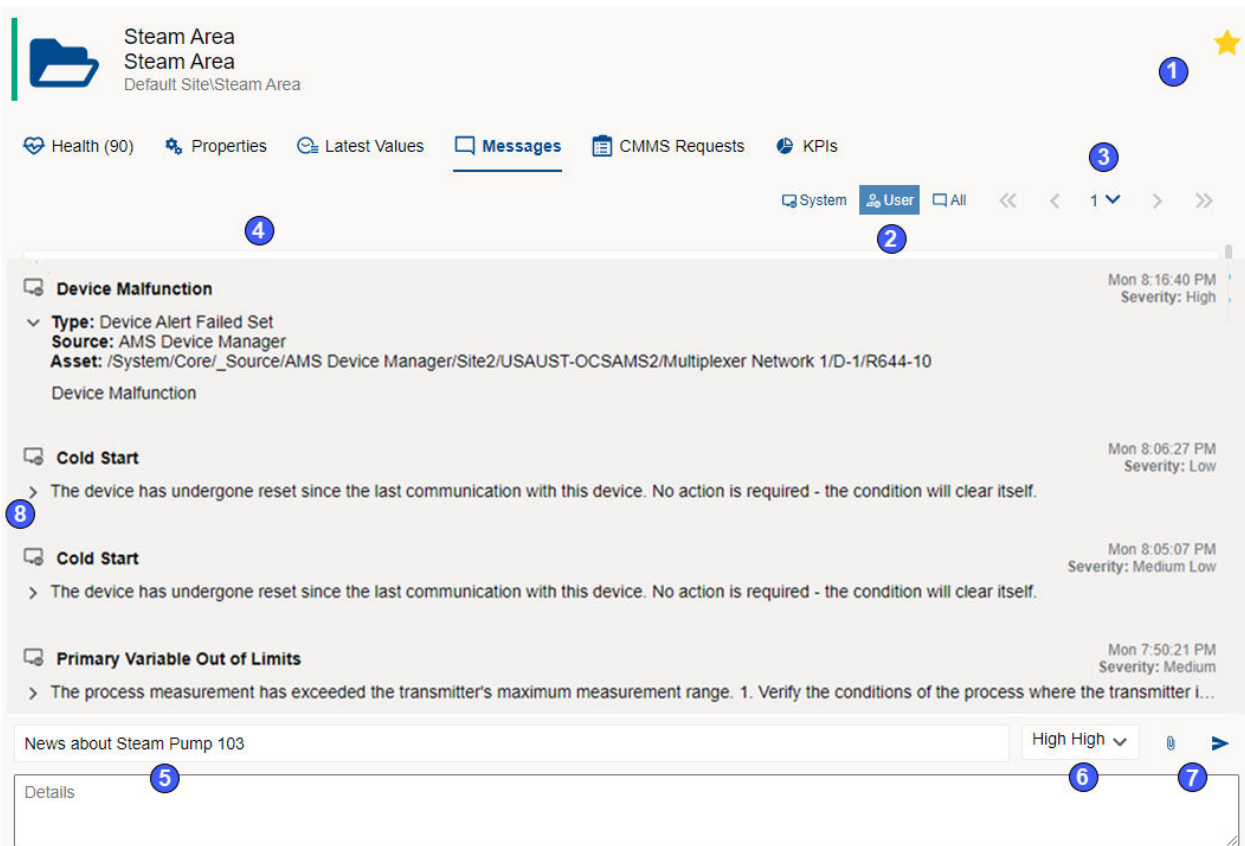
Access all the messages by selecting an asset and clicking the  Messages tab.

Figure 8-11: Messages tab controls



Legend	Description
1	Asset icons to indicate an asset on your Watch List(★) or an out of service (⊖) asset.
2	Click to switch among System (🖨️), User (👤), and All (🗨️) messages.
3	Page controls (⏪ < 1 > ⏩) that display a set of messages: first page, previous page, a specific page number, next page, or last page.
4	Message page (40 messages per page) with scroll bar. Messages display in descending date/time (most recent to older).
5	Compose a Message fields - Subject and message details.
6	Compose a Message - Severity selection list. The Severity selector uses the ranges defined by an administrator under the System Settings: Severities .
7	Compose a Message - Add attachment (select file from local PC) and Send controls. Your administrator defines the maximum file size. Emerson recommends that you keep file sizes less than 30 MB. See Related information for file types and file name extensions used by Plantweb Optics.
8	Displays (>) expanded message information (asset type, source, and hierarchy location).

Brief and expanded message formats

Brief message format

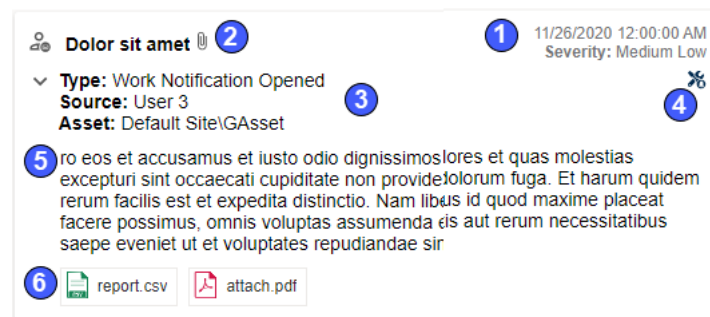
A brief message shows:

- Sender (user message)
- User (👤) or system (🔧) icon
- Subject and attachment (📎)
- Time stamp
- Severity
- Initial message details

Expanded message format

For any message in the **Messages** (📧) tab, click the arrow on the message left to show expanded format.

Figure 8-12: Expanded format example



Legend	Description
1	Time stamp and Severity (See Related information for details.)
2	Sender name, user (👤) or system (🔧), message subject, and attachment (📎).
3	Asset Type, Source, and Path found in the ISA-95 Equipment model. Message Type is synonymous to Event Type. Type can be an Event type, user generated, health change, plus a work request closed, opened, or canceled.
4	Create a work request.
	Note The CMMS work request only displays if the asset has an Asset Code.
5	Message details.
6	Attachment names with links (See Related information for details.)

8.3.5 CMMS Requests tab

Display work requests associated with a selected asset from the **Hierarchy** or KPI List Views.

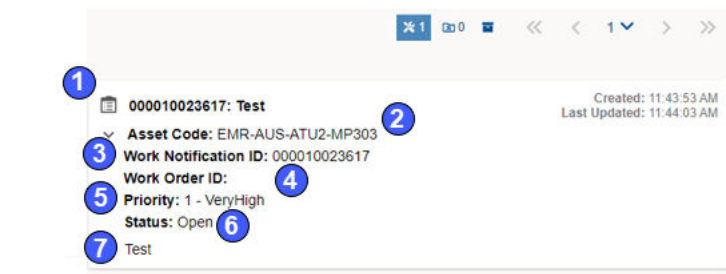
- Select work request priorities to match the MAXIMO or SAP CMMS configuration.
- Resend or delete an undelivered work request.

Figure 8-13: CMMS Requests tab



Legend	Description
1	Work request, asset code, notification ID, CMMS priority, status, user that created the request.
2	Open work requests filter.
3	Undelivered work requests filter.
4	Closed or Canceled work requests filter.
5	Page navigation controls–first, previous, page number, next, and last page controls.
6	Creation and last update time stamps.
7	Click (🔄) to resend a (Undelivered CMMS) work request.
8	Click (🗑️) to delete a (Undelivered CMMS) work request.
9	New Work request. Add Title and Details . Select Work Priority . Click Send .

Figure 8-14: Work request details

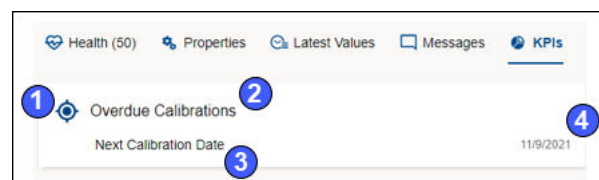


Legend	Feature	Description
1	Work Request Title	For open work requests, the Work Title uses the <i>Work Order ID</i> as a prefix. For an undelivered work request, the prefix <i>Undelivered</i> is attached to the Work Title .
2	Asset Code	Value that ties this asset's work request to the SAP/MAXIMO asset.
3	Notification ID	Exported to the CSV file for Undelivered and Open work requests.
4	Work Order ID	For MAXIMO, the Work Order ID displays immediately. For SAP, the SAP Admin needs to manually access a work order before the Work Order ID displays in Optics Portal.
5	Priority	One of the work priority values defined by the Plantweb Optics Administrator that matches the configured priority values in the SAP or MAXIMO system.
6	Status	Open , Undelivered , Cancelled , or Closed .
7	Work Request details	Description who created the request and the details of the work requested.

8.3.6 KPIs tab

Obtain asset information provided by Emerson Connectors or Plantweb Optics Connectors.

Figure 8-15: KPIs tab

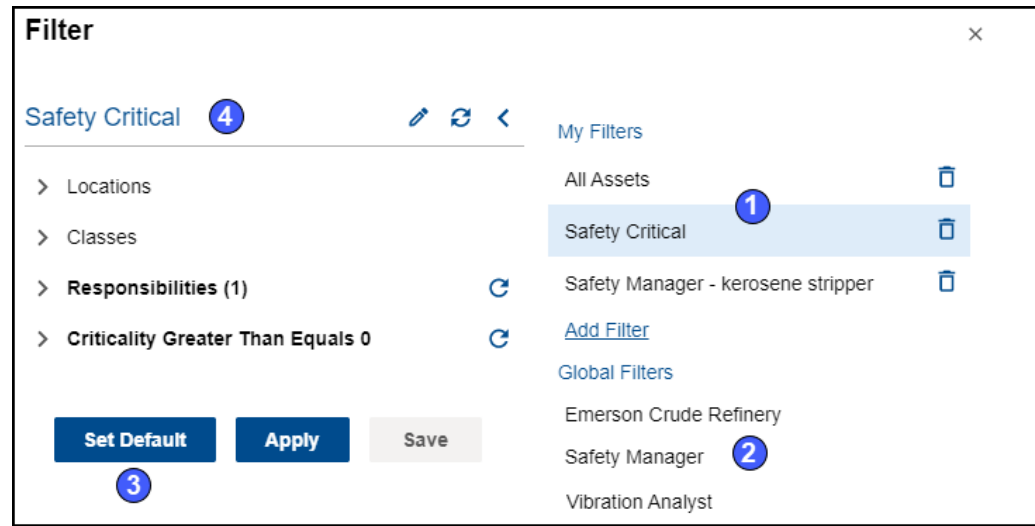


Legend	Description
1	Custom KPI icon
2	Custom KPI contributor subject
3	Custom KPI contributor details
4	Contributor time stamp

9 Asset display filters

This section shows the different types of asset display filters in Plantweb Optics Portal that you can use to focus your attention on specific assets:

Figure 9-1: Optics Portal asset filters - Show Filters dialog



Area	Description
1	User Filters —asset filter that can be applied to a list of assets. Each user filter is defined based on (a) user permissions (realm of responsibility), (b) Locations , (c) Classes , (d) Responsibilities —failure effects, functions, and interfaces, plus a (e) Criticality threshold. A maximum of 10 User Filters (My Filters) can be saved.
2	Global Filters —defined by your Plantweb Optics Portal administrator to help all users create their unique, persona-based User Filters.
3	Default Filter —one of the My Filters (User) designated. You cannot accidentally delete the Default Filter. You must select another User Filter with the Set Default button before you can delete the original filter.
4	Active Filter —a filter <i>currently applied</i> to an asset list and saved locally in the browser cache. The filter's name displays above the filter criteria in the Filter dialog and in the User Toolbar.

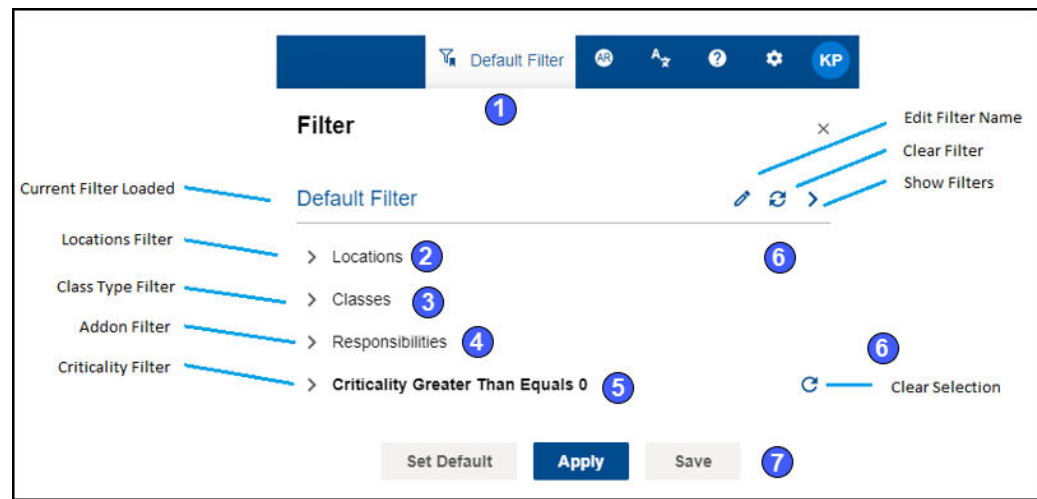
9.1 User Filters

Apply a filter to the current session of the Plantweb Optics Portal asset lists. The filter name that displays on the User Toolbar is referred to as the *Active Filter* or currently selected User Filter. You can save a maximum of 10 User Filters.

Note

Remember the entire site asset list is *initially filtered* according to your assigned user permissions. (Also known as your *realm of responsibility*.)

Figure 9-2: User Filter controls



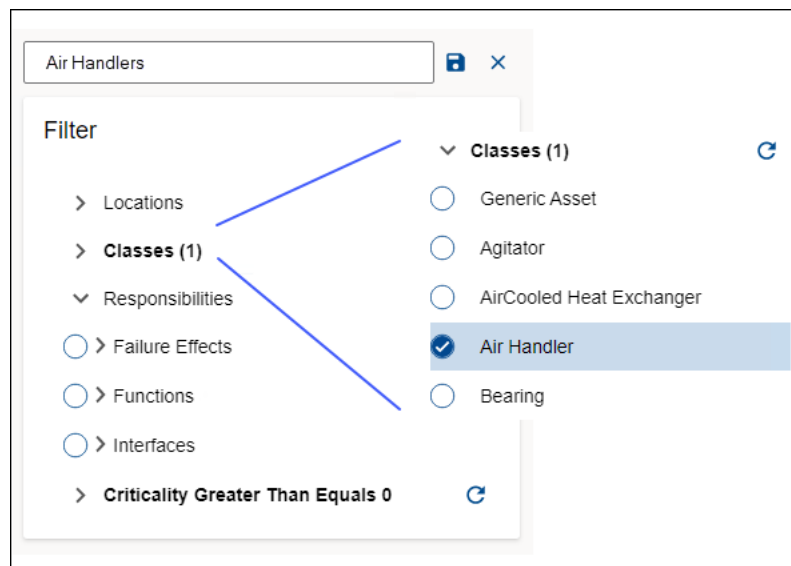
Legend	Feature	Description
1	Active Filter name	Name of the User filter that defines restrictions for showing the asset lists.
2	Locations (criteria)	Organization areas on the asset list used to restrict the assets displayed.
3	Class Type (criteria)	Examples include Generic Asset , Machine , Pump , Compressor , and so forth.
4	Responsibilities (criteria)	Failure effects, functions, and interfaces that define what assets are displayed on lists. Plantweb Optics supports predefined Failure Effects that include (a) Safety Critical, (b) Air Pollution Control, (c) Hazardous Material Control, (d) Environmental Control, and (e) Production Control.
5	Criticality (criteria)	The asset criticality threshold required to display the asset.
6	Filter Controls	<ul style="list-style-type: none"> Edit Filter (✎)–change filter specifications. Clear Filter (🗑️)–remove and clear all selections from the filter. Show Filters (➤)–list all User Filters and Global Filters. One filter has a Default Filter indicator. Clear Selection (🔄)–remove and clear all selections for one of the four filter criteria (Locations, Classes, Responsibilities, or Criticality threshold).

Legend	Feature	Description
7	Filter Control Buttons	<ul style="list-style-type: none"> • Set Default—save this User Filter. It cannot be deleted until another filter is designated as the default. • Apply—make this filter the Active Filter applied to the displayable assets. • Save—save the current filter specifications as a User Filter. If you started with a Global Filter, you are prompted for a <i>new name</i> that will display under My Filters.

9.2 Global Filters (applied)

Ten Global Filters can be defined by your Plantweb Optics Administrator. You (non-administrator) can display the criteria for each Global Filter, and you can change the filter criteria. However, you *must* save the changed filter as a User Filter.

Figure 9-3: Global Filters Criteria - example



9.3 Default and Active filters

When you start a Plantweb Optics session, the **Active Filter** is applied to your asset list views.

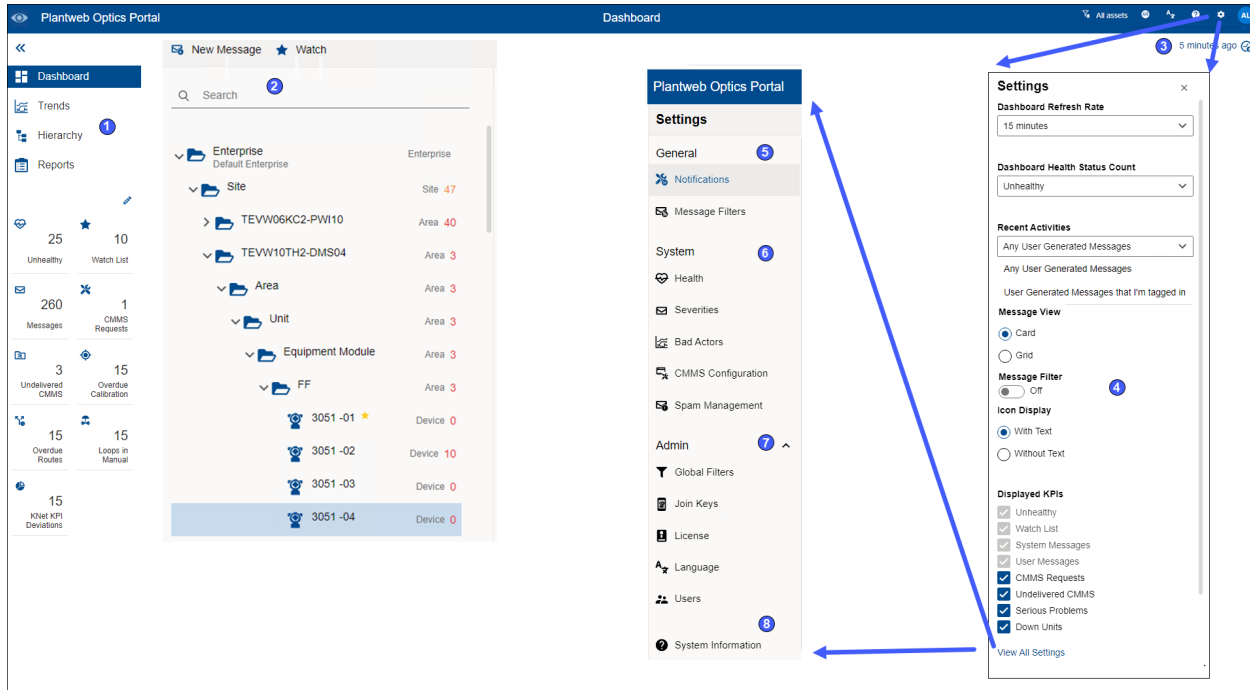
The name of the currently Active Filter applied to your displayed asset list, shows next to the (Y) icon in the User Toolbar. This filter is stored in memory and *saved* from session to session.


The **Default Filter** cannot be deleted until another User filter is designated as the new **Default Filter**.

10 Settings

The Plantweb Optics Portal has multiple key setting groups that you use to control the Optics Portal user interface.

Figure 10-1: Plantweb Optics Portal Settings



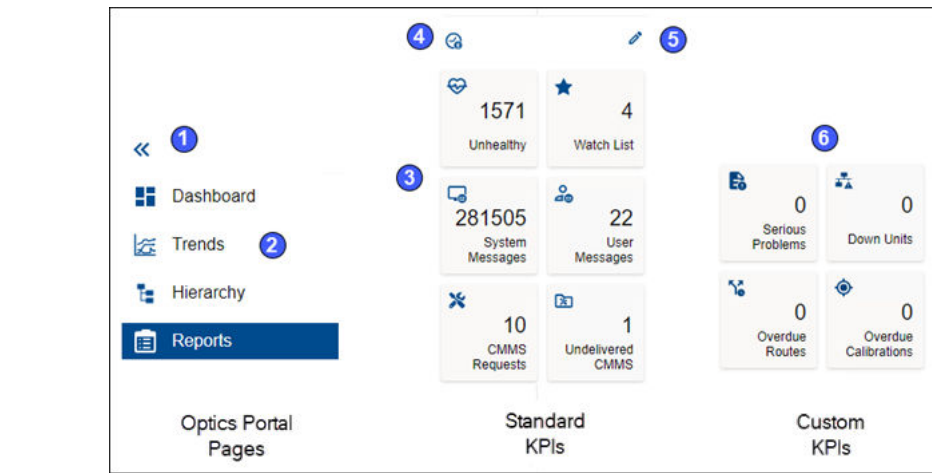
Legend	Feature	Description
1	Left Pane	Displays the four different key browser pages: Dashboard , Trends , Hierarchy , and Reports , plus the KPIs. This area displays UI controls with and without text. Display or hide individual KPIs.
2	Hierarchy and KPI List View	Hierarchy settings include expanding and collapsing portions of the logical asset hierarchy. Search for specific assets using the asset identification fields and message subject. KPI List View settings can (a) export information to CSV files, (b) search asset lists, and (c) sort asset lists
3	User Toolbar	Provides name of the current Active Filter and user interface Language . Additionally, it provides links to the Augmented Reality application, the <i>Plantweb Optics Port Help</i> documentation, the Quick Display settings, plus the user profile and log out.
4	Quick Display	Click the gear  icon to display controls for the Dashboard .
5	General (User)	Define the Notifications and Message Filters criteria.

Legend	Feature	Description
6	System	System Settings can be displayed by users; however, only Administrators can change the System settings.
7	Admin	Administrator permissions required to display and change settings.
8	System Information	Display the Plantweb Optics version and build numbers. Your license status and system identification also display.

10.1 Left pane settings

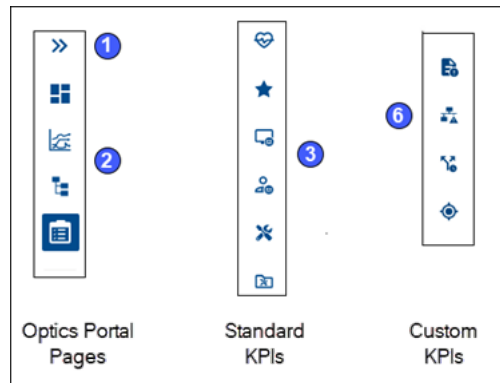
Use the left pane settings to conserve screen space on Plantweb Optics Portal application. Display text and icons or, alternatively, just the icons that signify the four key Optics Portal pages and KPI List Views.

Figure 10-2: Left Pane settings (text and icons)



Legend	Description
1	Click (≪) icon to display icons. Click (≫) icon to display text, KPI tiles, and icons.
2	Display one of Optics Portal key pages.
3	Standard KPIs
4	Hover over to see time since last Dashboard update.
5	Click to pin (📌) or unpin (🗑️) KPI tiles to the Dashboard.
6	Custom KPIs (dependent on Plantweb Optics Connectors)

Figure 10-3: Left Pane settings (icons only)

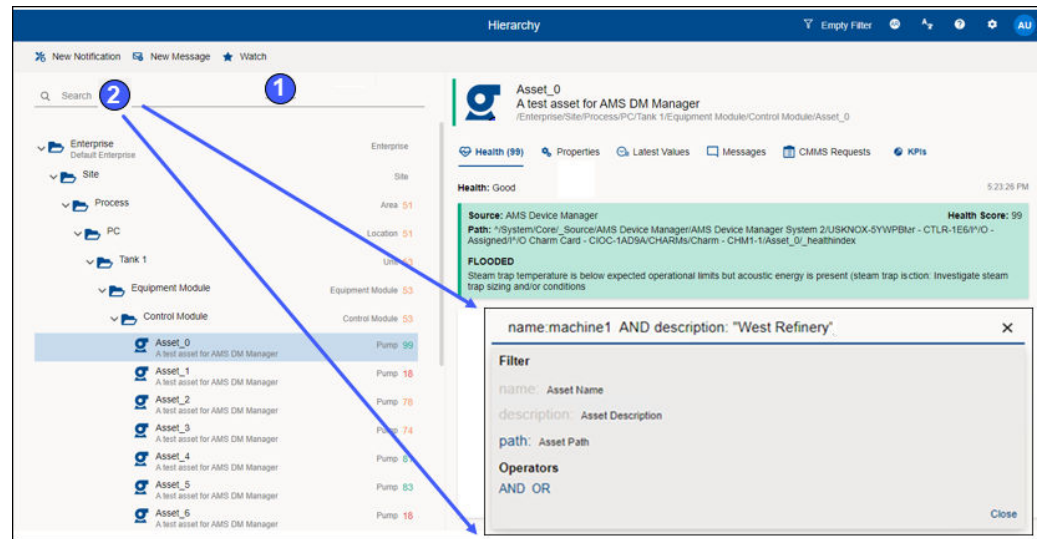


10.2 Hierarchy and KPI List View settings

These Plantweb Optics controls help you:

- Search the Asset Hierarchy.
- Export KPI List View assets to a spreadsheet file.
- Start a new message or CMMS notification.

Figure 10-4: Hierarchy and KPI List View settings



Area	Feature	Description
1	Ribbon Controls	Perform functions specific to asset hierarchy or a KPI List View. Examples include, (a) create a new message, (b) create a new notification, (c) export the asset/equipment information to a CSV file, plus (d) watch or unwatch an asset.
2	Asset Sort	Sort the asset hierarchy or KPI asset list using asset identifications fields (Name, Description, and Path).

Note

When a search returns more than 100 assets, click the **Load More Assets** link at the bottom of the list to return additional assets.

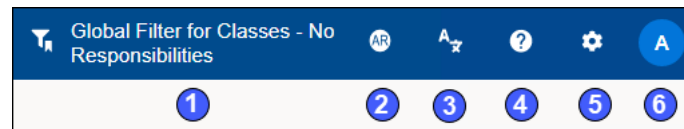
Note

You can use the Boolean operators AND and OR to make a more complex search that uses multiple fields.

10.3 User Toolbar

You can perform several functions with the User Toolbar.

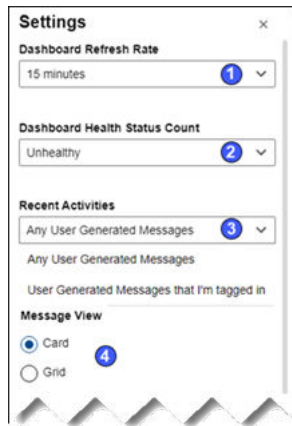
Figure 10-5: User Toolbar



Legend	Description
1	User Filter name used as the <i>current</i> Active Filter.
2	Start Augmented Reality application (with join key license)
3	Change your language for the Plantweb Optics Portal interface.
4	Display <i>Plantweb Optics Portal Help</i> .
5	Show Quick Display Settings pane.
6	Display user account information and link to log out of Optics Portal.

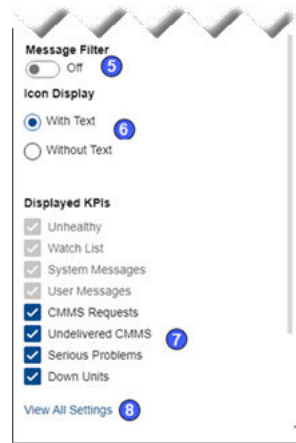
10.3.1 Quick Display Settings

Change several **Dashboard** and message display settings by clicking the Gear (⚙️) icon in the User Toolbar.

Figure 10-6: Quick Display Settings (part 1 of 2)

Legend	Description
1	Set Dashboard refresh interval in minutes or hours.
2	Set type (Unhealthy or Good) of Health Status Count (Health: circle graph).
3	Select message type (Any User Messages or Messages that I'm tagged in) to display in Recent Activities .
4	Select the Grid or Card message format.
5	Turn On or Off the Message Filter .
6	Display asset dialog tabs with or without text (icons only).
7	Select which KPIs to display on the Dashboard .
8	Click View All Settings link to access the General (user), System , and Admin Settings (administrators only).

Figure 10-7: Quick Display Settings (part 2 of 2)



10.4 General (User) Settings

Settings that you can customize to determine what notifications and messages you receive.

Click the **Settings** (⚙️) icon and then click **View All Settings** link at the bottom of the **Settings** window.

The **General Settings** include:

- **Notifications**—circumstances (assets, criticality, message severity) where user receives an email or a mobile push notification (or both).
- **Message Filters**—system message preferences (previous number of days, event types, and collectors). User messages affected only by the evaluation interval (previous days).

10.4.1 Notifications

Select your notification settings to only receive messages about events.

⚠️ CAUTION

You must select *at least one* notification type (**Mobile Push Notification**, **Email**, or both) to select options in the next four fields.

You can subscribe to events selected by:

- Your Watch List
- Selected by a User Filter
- Selected by a Global Filter

Restrict notifications to those generated by:

- User messages
- System Messages

- User and System Messages

Set the criticality value to limit notifications about important assets. Also, limit notifications to messages with severities greater than or equal to a value. See Related information for details.

Figure 10-8: Notifications

Legend	Description
1	Select one or more (Email or Mobile Push Notifications) notification types.
2	Select a filter. You can use your Watch List , Global Filter, or any of your User Filters.
3	Include assets that have a minimum criticality value.
4	Select user messages, system messages, or both.
5	Set a message severity threshold. You only receive messages with an OPC severity greater or equal to this severity.
6	Click Save to change notifications settings.

10.4.2 Message Filters (settings)

Select your preferences for system messages (events) and user messages. This function replaces the *Message Subscription* feature in the previous software versions.

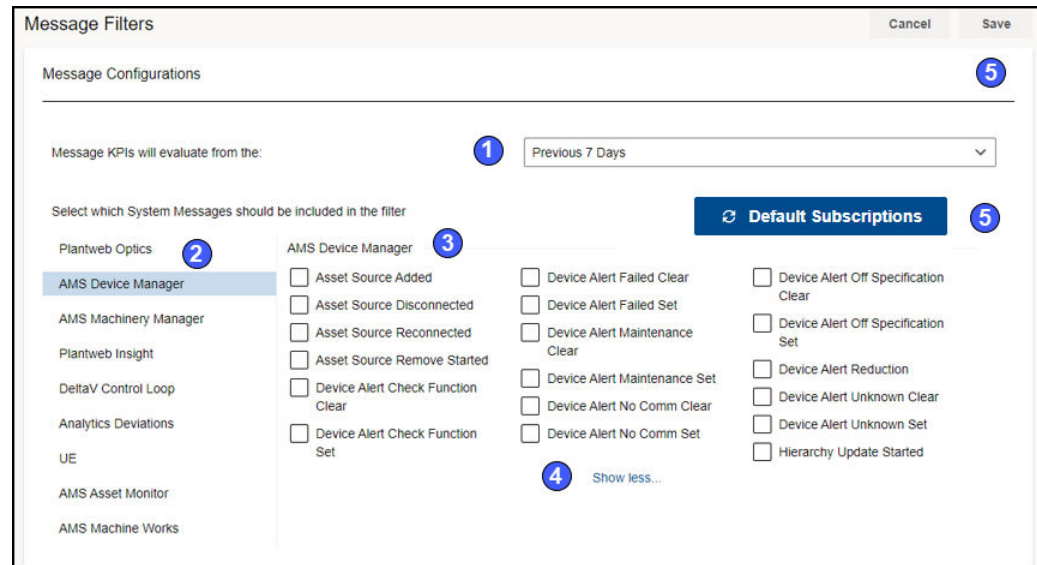
Limit messages based on:

- Message age (user and system messages)
- Optics Portal application (CMMS work requests)
- Plantweb Optics Connectors
- Alerts created by Emerson Connectors (data collectors)

Note

When you make no selections for a Plantweb Optics Connector (or Plantweb Optics) and it does not provide **Default Subscriptions**, no system messages display.

Figure 10-9: Message Filters



Legend	Description
1	Evaluation interval for KPI messages; seven, 30, 60, or 90 days.
2	Select an application or Plantweb Optics Connector.
3	Events generated by application or Plantweb Optics Connector.
4	Show less or Show more to display events.
5	Reset your selection to the events a Plantweb Optics Connector chooses as defaults.
6	Save your settings.

10.5 System Settings

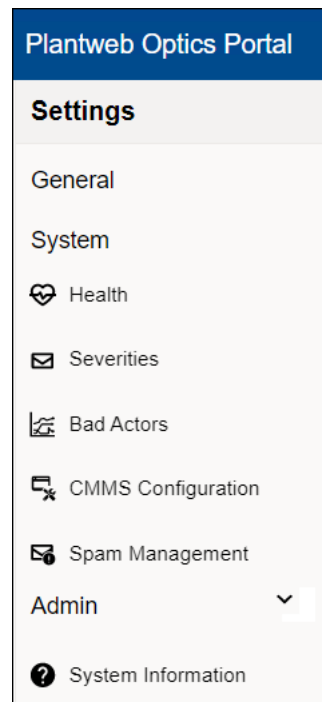
System settings affect all users for a Plantweb Optics Portal installation. You can display, but not change the settings.

Note

You must have Administrator permissions to change the System Settings.

Click the **Settings** (⚙️) icon, then click **View All Settings** link at the bottom of the **Settings** window.

Figure 10-10: System Settings



Legend	Feature	Description
1	Health	Set the health roll-up calculation method to Average or Worst .
2	Severities	Map OPC Severity values (0 through 1000) to several Optics Portal ranges. Each Optics Portal Severity is designated by a name, for example, Very Low, Low, Medium, High, or Very High.
3	Bad Actors	Evaluate whether an asset should be designated a Bad Actor by evaluating Criticality, number of event occurrences, happens in the evaluation interval, and is one of the selected event types.
4	CMMS Configuration	Specify the CMMS System server that receives the Optics Portal work requests. Define the work request priority values so that they match the SAP or the Maximo CMMS software.
5	Spam Management	Define the number of occurrences of a duplicate message title before the Optics Portal designates this messages as spam.

10.5.1 Health (calculation method) setting

Plantweb Optics Portal calculates the health of each asset in the system and displays it as a numerical rating. Each Plantweb Optics Connector that interacts with a given asset, assigns it a health score between 0–100, where zero is completely unhealthy, and 100 is completely healthy. Plantweb Optics Portal calculates an overall asset health score based on the entries of all contributors..

The health calculation method sets how the system weighs the combined health scores of your assets.

Note

To see the calculation results, return to the Hierarchy and refresh your browser page.

Prerequisites

Display the **Hierarchy** (🏠).

Procedure

1. Click the **Settings** (⚙️) icon in the User Toolbar.
2. Click **View All Settings** link at the bottom of the Quick Display Settings pane.
3. Click **Health** under **System** on the **Settings** dialog.
4. Choose the **Health Calculation Method** from the drop-down list.

Method	Description
Average	(Default) Averages all individual health scores coming from all contributors.
Worst	Uses the lowest health score coming from all contributors.

5. Click **Save**.
6. Return to the **Hierarchy** (🏠) page and refresh the browser page to reflect the new health roll-up calculation method in the **Hierarchy**.

10.5.2 Severities (settings)

Severities are ranges of OPC severities (1-1,000) that your administrator can define. Use these severities to indicate the extent that an asset problem can impact your operations. Display the Severities Settings. Only Administrators can change the values. Severities display in all types of messages.

For Severities, your Plantweb Optics Administrator must:

- Adjust the distribution of OPC severity values.
- Cover the *entire* OPC severity range (1 to 1,000).
- Ensure that Severity ranges do not overlap (duplicates) or skip (omit) any of the 1-1000 OPC severity values.

Figure 10-11: Severities - System Settings

Severity	OPC Severity
Very High	750 - 1000
High	500 - 749
Medium	251 - 499
Low	1 - 250

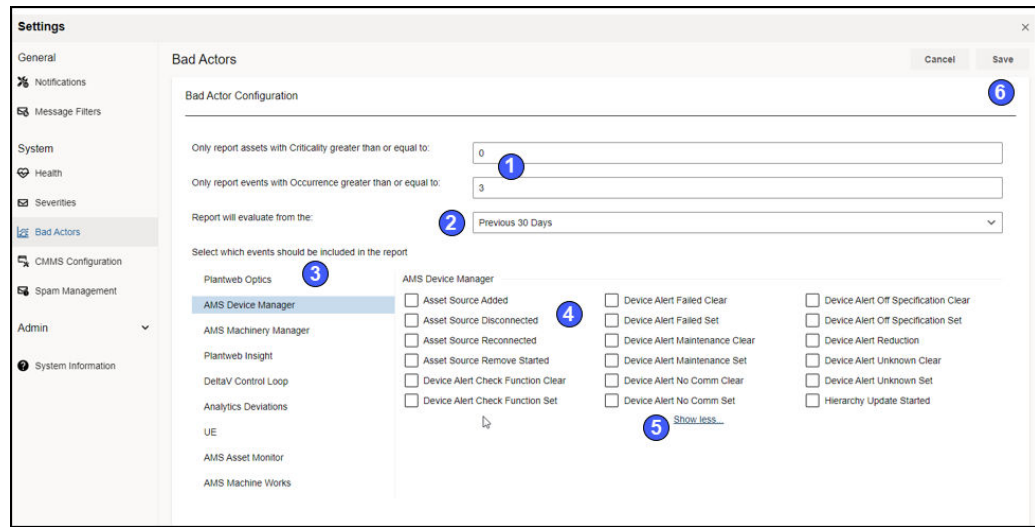
Legend	Description
1	Optics Portal Severity (range),
2	OPC Severity –Map Severity name to OPC severity values.
3	Controls to edit OPC values or delete a Severity name.
4	Add a new Severity and define the OPC Severity values.
5	Save your changes.

10.5.3 Bad Actors (settings)

Bad Actors are assets associated with frequent failures, that create numerous events, and can result in high maintenance costs. Administrators can identify these assets by setting a threshold criticality value and occurrence value in the **Bad Actors** dialog. Assets that report values higher than the thresholds that you set, display on the **Bad Actors** pane of the **Dashboard** and in the **Bad Actors Report**.

Every user can display the criteria used to identify assets as "bad actors." However, only Administrators can change the criteria to identify bad actors.

Figure 10-12: Bad Actors - System Settings



Legend	Description
1	Set criticality and event count thresholds.
2	Evaluate the previous (7, 30, 60, or 90) days of data.
3	Select Plantweb Optics application or Plantweb Optics Connector.
4	Select specific events for the chosen application or Plantweb Optics Connector.
5	Control the size of the event list.
6	Save changes. Optics Portal updates the Bad Actors display and report on the next Dashboard refresh.

10.5.4 CMMS Configuration (settings)

Use the CMMS Configuration settings to specify the settings and interface elements need to connect the Plantweb Optics Portal to an SAP or MAXIMO CMMS System. You must have Administrator permissions to save the changes.

⚠ CAUTION

Unmatched work request priority values result in undelivered work notifications to Optics Portal.

⚠ CAUTION

When specifying the CMMS Interface **Server**, avoid adding the `http://` protocol and the final `/` (forward slash).

Figure 10-13: CMMS Configuration - System Settings

CMMS Configuration
Cancel Save

[Export CMMS](#)

CMMS connection settings and configuration

CMMS Interface Server 1

Port

Update Rate (Minutes)

Enable Secure Connection (SSL) 2

Domain

Username

Password

CMMS Settings

Maintenance Plant 3

Notification Type

Work Request Priorities
The priority value needs to be available in your CMMS system, or else, the work request will fail.

Priority Name	Priority Value	
VeryHigh 4	1	✎ □
High	2	✎ □
Medium	3	✎ □ 5
Low	4	✎ □ +

Enable Automatic Notifications 6


Asset Health Less Than or Equal

Asset Criticality Greater Than or Equal

Polling Rate (Minutes)

Work Notification Priority

Legend	Description
1	CMMS interface server and port number.
2	<div style="display: flex; align-items: center;"> <div> <p>Attention</p> <p><i>Not supported in this software release.</i></p> <p>Use an SSL connection and specify the authentication credentials.</p> </div> </div>
3	CMMS internal (SAP or MAXIMO) identification settings.
4	Work request priority values.
5	Add, delete, and change work request priorities (name and value).

Legend	Description
6	 Attention <i>Not supported in this software release.</i> Generate automatic notifications for critical assets by selecting health score and criticality thresholds.

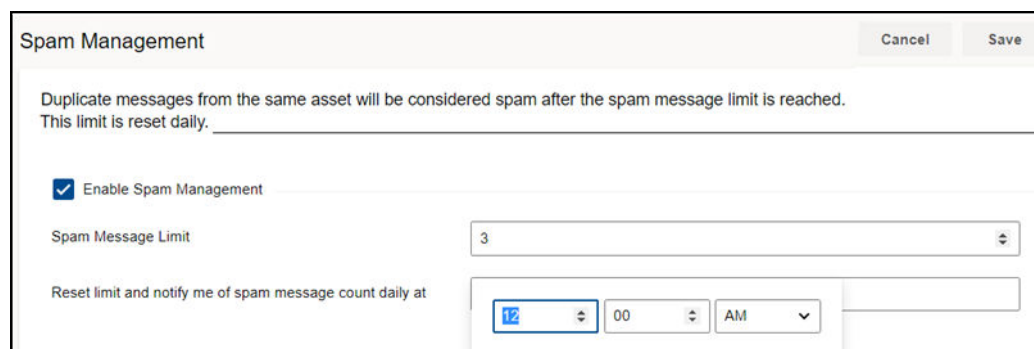
10.5.5 Spam Management (settings)

Use Spam Management to limit the number of duplicate system-generated messages (same type and title) created by assets. Duplicate messages from the same asset are considered spam after the spam message limit is reached. This limit resets daily.

The Spam Management settings helps the Administrator to:

- Enable spam management. *Must be done first.*
- Set the spam message limit. You may set the limit from 3 to 100 for duplicate system messages.
- Specify the reset time of the spam message limit. You can set the specific time of day and receive a daily report of the spam message counts.


Figure 10-14: Spam Management - System Settings



Note

Spam only effects system-generated messages and never suppresses user-generated messages.

To access the spam management settings:

1. From the Optics Portal Dashboard, click  on the top right of the screen.
2. From the Settings panel, click **View All Settings** at the bottom off the screen.
3. Click **Spam Management**.
4. Click **Enable Spam Management**.
5. Set the spam message limit and the reset time daily.
6. Click **Save**.

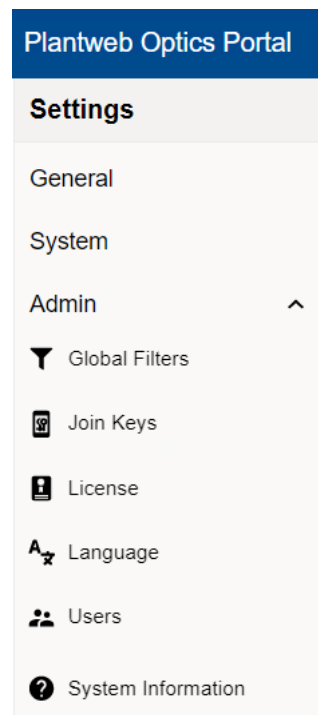
10.6 Admin Settings

Use **Admin Settings** to manage Plantweb Optics Global filters, Optics Portal user information, join keys, licenses, and the UI language packs.

Users who are not administrators cannot display this section of the **Settings**. You can see and change these **Admin Settings** only when you are a Plantweb Optics administrator.

Click the **Settings** (⚙️) icon and then click **View All Settings** link at the bottom of the **Settings** window.

Figure 10-15: Admin Settings



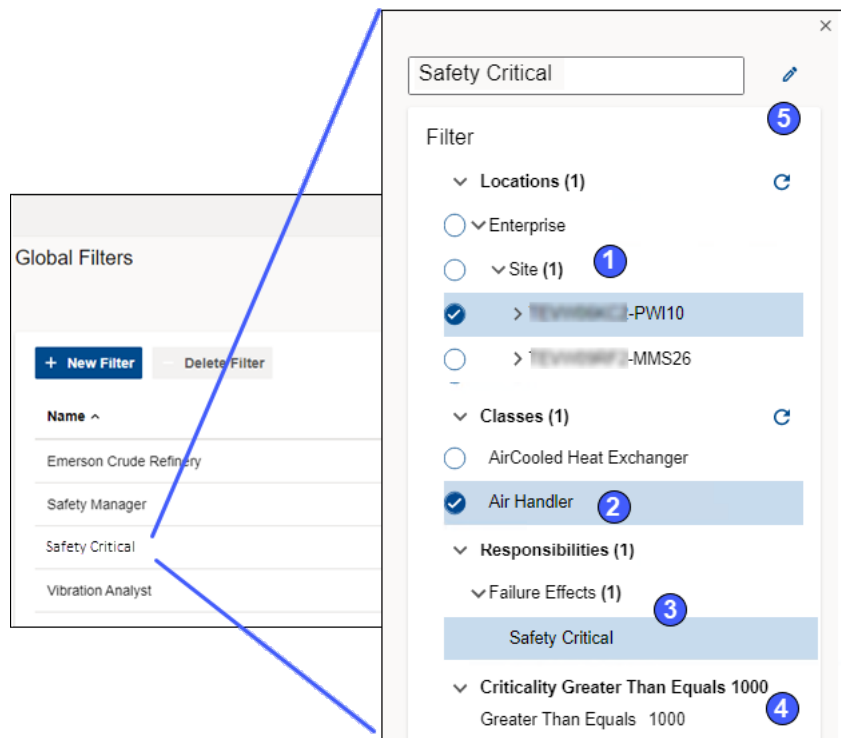
Legend	Feature	Description
1	Global Filters	Define asset filters for every Plantweb Optics user. Users can copy these Global Filters to make unique User Filters that factor in their assets realm of responsibility (assigned) and persona-based job requirements (user selected).
2	Join Keys	Issue, display, export, and disable keys assigned to users who must access the Plantweb Optics Augmented Reality (AR) or Plantweb Optics Mobile.
3	License	(a) Request a proposal for a license from Emerson, (b) display Guardian Information collected about your Plantweb Optics servers, (c) display information about all customer licenses and their key names, plus (d) register a Plantweb Optics Portal license using the license file emailed to you.

Legend	Feature	Description
4	Language (User interface)	Install new Plantweb Optics Portal language packs. On the User Toolbar, any user can switch between the UI languages loaded by the administrator. See Related information for details.
5	Users	Add, change, display, export (CSV file), or delete Plantweb Optics Portal user information. Disabling, locking, or unlocking user accounts (and other functions) must be done in the Plantweb Optics DataStudio.

10.6.1 Global Filters (settings)

Define asset filters for all Plantweb Optics Portal users. Administrators can save a maximum of 10 Global Filters.

Figure 10-16: Global Filters - Admin Settings



Legend	Feature	Description
1	Locations (settings)	Organization areas on the asset hierarchy used to restrict the assets displayed.
2	Classes (setting)	Examples include Generic Asset, Machine, Pump, Compressor , and so forth.

Legend	Feature	Description
3	Responsibilities (setting)	Failure effects, functions, and interfaces that define what assets are displayed on lists. Plantweb Optics supports predefined Failure Effects that include (a) Safety Critical, (b) Air Pollution Control, (c) Hazardous Material Control, (d) Environmental Control, and (e) Production Control.
4	Criticality (setting)	The asset criticality threshold needed to display the asset.
5	Global Filter Controls	<ul style="list-style-type: none"> Edit Filter (✎)–change filter settings. Clear Selection (☒)–remove and clear all selections for one of the four filter criteria (Locations, Classes, Responsibilities, or Criticality) threshold.

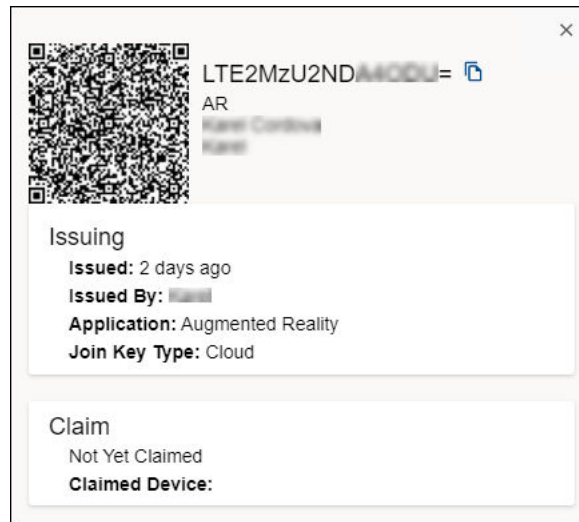
10.6.2 Join keys (settings)

Create, issue, and manage join keys for the Plantweb Optics Augmented Reality and Plantweb Optics Mobile applications.

Administrators can:

- Create and manage join keys for users that work with the Augmented Reality or Plantweb Optics Mobile apps.
- Issue a join key, enable a key (*green*), delete a key, disable a join key (*gray*), and re-enable a key for a user.
- Send one or more users a notification when issuing a join key that contains the QR code of the join key, link, join key, site name, server name, and System ID.
- Display enabled, disabled, or both types of join keys.
- Export all join key information to a CSV (spreadsheet) file.

Figure 10-18: Join Key example



10.6.3 License

Users with Administrator rights can display and make changes in the **License** dialog. The license generation software for the current Plantweb Optics version has multiple changes:

- Application licenses are assigned based on the number of users.
- Number of Plantweb Optics Portal users and Plantweb Optics Mobile users are independently assigned.
- For each Plantweb Optics Mobile user, five Mobile Tokens are assigned.
- CMMS licenses are assigned based on the planned number of organization work requests.
- Licenses are checked daily for expiration. Expiration notices are sent to Plantweb Optics Portal and Plantweb Optics Mobile admins at 90, 60, 30, and 7 days prior to license expiration.

Figure 10-19: Plantweb Optics components for a license example

Plantweb Optics Version 1.5 1.6 1.8

Pick one

Plantweb Optics Users

Augmented Reality or Augmented Reality Plus

Plantweb Optics CMMS Integration

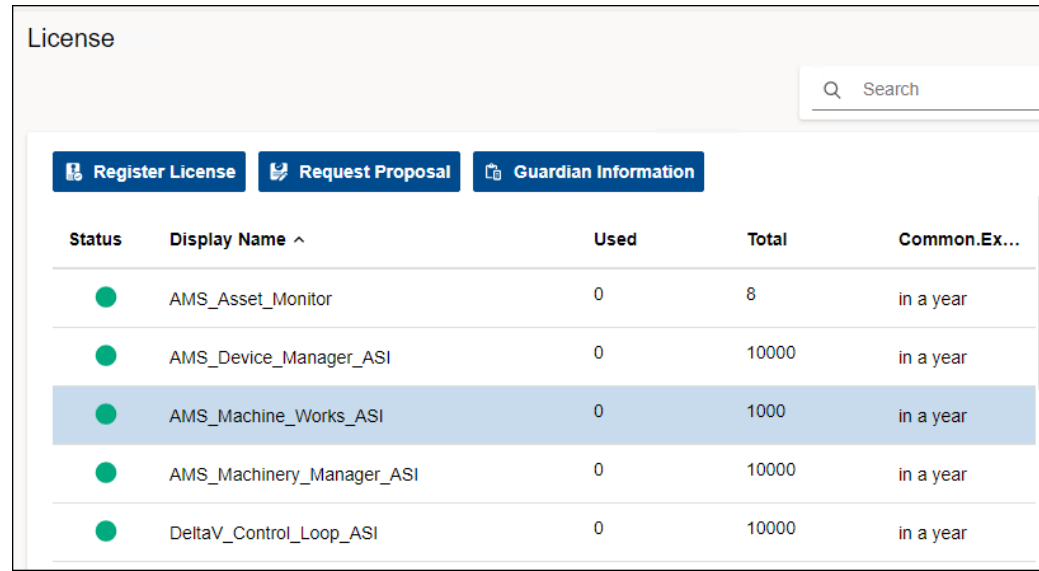
Mobile Users

Current License	
Feature	Amount
Plantweb Optics Version	1.8
Plantweb Optics Platform	ON
Plantweb Optics Users	10
Plantweb Optics Mobile	ON
Plantweb Optics Mobile Tokens	5
Plantweb Optics CMMS Integration	1000000

On the License dialog (**Admin Settings**) in Plantweb Optics, the administrator can:

- Download Guardian plant identification and performance information.
- Register and upgrade Plantweb Optics licenses.
- Display usage of, and the status of Plantweb Optics licenses.
- Retrieve System IDs and Machine fingerprints.

Figure 10-20: License - Admin Settings

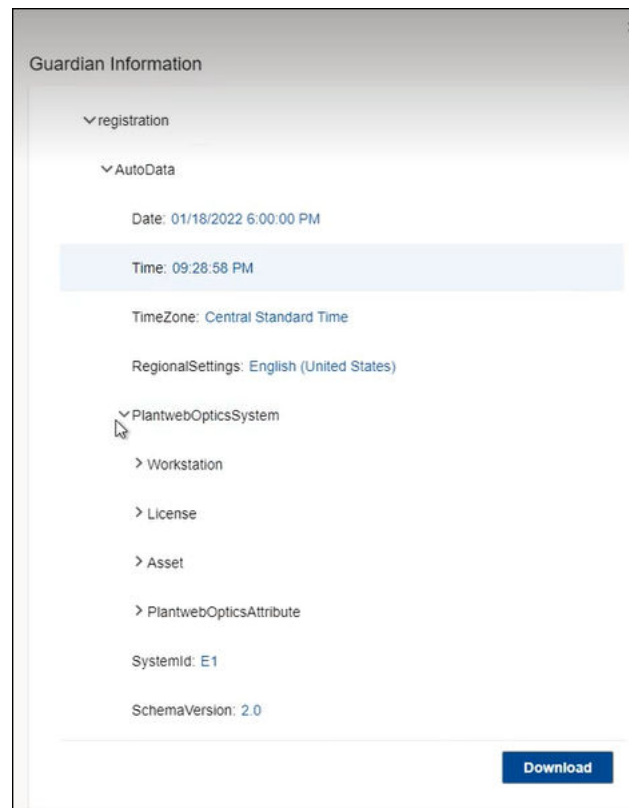


License

Search

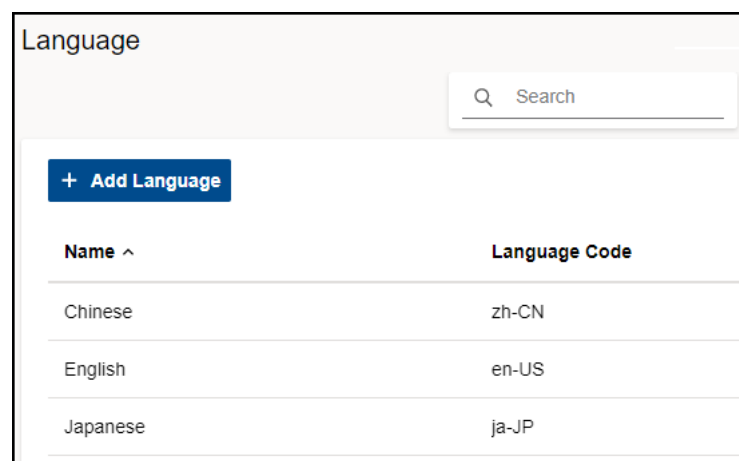
Register License Request Proposal Guardian Information

Status	Display Name ^	Used	Total	Common.Ex...
●	AMS_Asset_Monitor	0	8	in a year
●	AMS_Device_Manager_ASI	0	10000	in a year
●	AMS_Machine_Works_ASI	0	1000	in a year
●	AMS_Machinery_Manager_ASI	0	10000	in a year
●	DeltaV_Control_Loop_ASI	0	10000	in a year

Figure 10-21: Guardian Information example

10.6.4 Language (settings)

Add a language pack so that any user can display the user interface text in one of several languages.

Figure 10-22: Language - Admin Setting

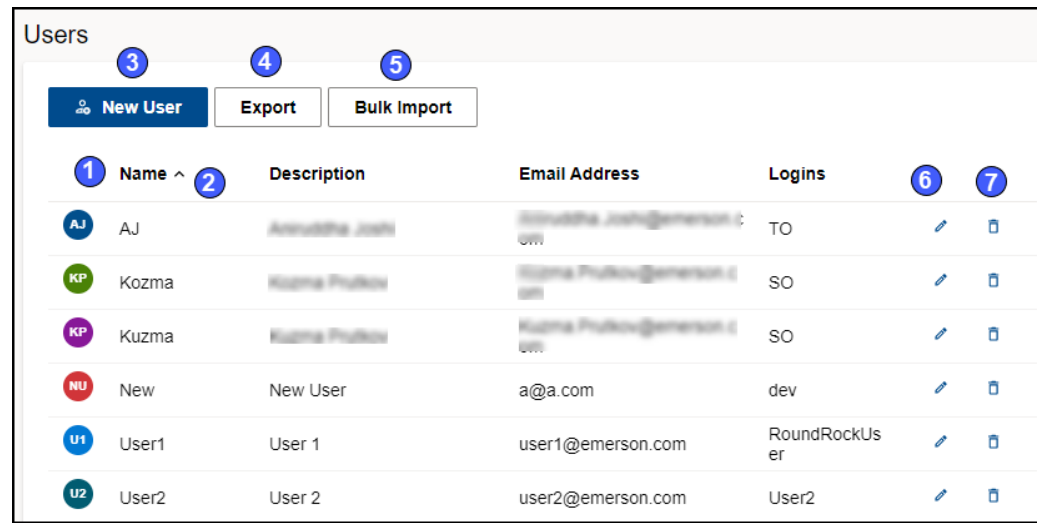
10.6.5 Users

Manage the Plantweb Optics Portal user login information needed for collaboration with other users. All user authentication information (using a profile, Windows login, or Active Directory) must be set up in Plantweb Optics DataStudio.

Note

Only Administrators can display and change Users information.

Figure 10-23: Users dialog

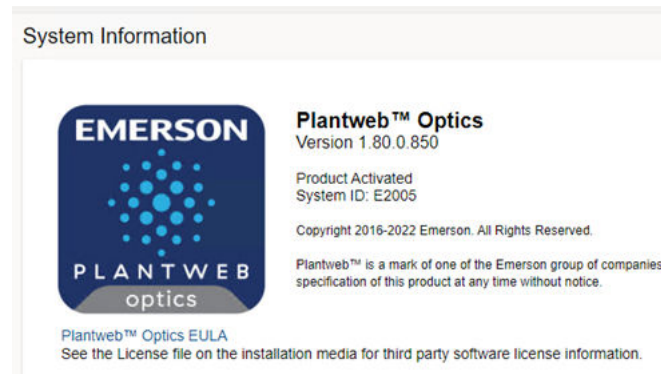


1	Name ^	2	Description	Email Address	Logins	6	7
AJ	AJ	AJ	AJ	AJ@emerson.com	TO		
KP	Kozma	Kozma	Kozma	Kozma@emerson.com	SO		
KP	Kuzma	Kuzma	Kuzma	Kuzma@emerson.com	SO		
NU	New	New User	New User	a@a.com	dev		
U1	User1	User 1	User 1	user1@emerson.com	RoundRockUser		
U2	User2	User 2	User 2	user2@emerson.com	User2		

Legend	Description
1	Select Name column to sort list.
2	Sort all users by clicking a column title. Select ascending or descending alphabetical order.
3	Add new user manually.
4	Export all user information to a CSV (spreadsheet) file.
5	Import user information obtained from Plantweb Optics DataStudio. Uses a CSV (spreadsheet) file.
6	Edit () the user information that includes Name, First Name, Last Name, Email Address, and Logins.
7	Delete () a user.

10.7 System Information

To find the System Information, click the **Settings** () icon and then click **View All Settings** link at the bottom of the **Settings** window. Click **System Information**.

Figure 10-24: System Information (Settings)

The **System Information** dialog provides the:

- Current software build number.
- Plantweb Optics version number.
- License Status
- System identification.
- Link to the Plantweb Optics end user license agreement (EULA). Click **Plantweb™ Optics EULA**.

Glossary

90-day health status trend

A graph of the number of assets categorized with a Critical (red) health score and a Warning (orange) health score plotted for the previous 90 days.

action item

The Plantweb Optics DataStudio container for the logic (out-of-the-box or custom) that is implemented.

alert category

A Plantweb Optics device or NAMUR NE-107 Diagnostic classification used to filter messages into Abnormal (those affecting health) or Advisory (no health impact).

Analytics Deviations

Previously known as *KNet KPI Deviations*.

asset

Any physical component (such as a device or machine) being monitored by Plantweb Optics DataStudio, or the logical representation of a physical asset. Examples include a motor, a pump, a fan, or a turbine.

asset class

A classification used to filter the asset list. Examples of asset classes include boiler, fan, gearbox, cooling tower, and so forth.

asset criticality

A value representing the importance of an asset with respect to other system assets . You specify the criticality using an integer value between 1 and 100,000.

asset health

A numeric value on a normalized health scale from 0–100. It creates a single health index for an asset from the individual health score of the asset and from the health score of child assets, when available.

asset hierarchy

The organization of assets by location (site, area), data collector type (formerly known as ASI type), and asset source.

asset source

Anything that collects data to be associated with an asset. For example, an *AMS 9420 Wireless Vibration Transmitter*.

attachment

A document or image file linked to a specific asset. Emerson recommends that you keep file sizes less than 30 MB. For a complete list of accepted file types, refer to the *File attachments* topic in the *Plantweb Optics Portal Help*.

augmented reality (AR)

Plantweb Optics Augmented Reality overlays digital information on physical images to increase productivity, safety, and insight.

Bad Actors

A list and report of assets associated with frequent failures and that create numerous events. List of assets and event types that meets the criteria (set by an administrator) in the **Bad Actors** settings.

- Calculated once a day
- Select the time range to display (7, 30, 60, or 90 days) by the user
- Filtered based on the selected User Filter
- Based on the results after applying the User Filter
- Expandable display to show more Bad Actors information, such as the Asset description and Asset Path (hover over path name to see the complete path hierarchy).
- Can be exported to a comma separated-value file (spreadsheet)

card view

A method of displaying the list of messages such that each message's information is in a single pane. You can expand the card to see additional message information and any attachments. See *grid view*.

class

A type of asset device (generic asset, boiler, fan, furnace, etc.) used to filter lists of assets.

CMMS

A computerized maintenance management system (CMMS) that contains a customer's maintenance and supply operations that can receive a work request from a Plantweb Optics Portal. The **CMMS Configuration** settings define the Internet connection setting and work request priorities. SAP and Maximo are two examples of CMMS software.

You can create a new work request, and also resend or delete undelivered work requests. Plantweb Optics updates work status based on polling rates. An administrator can automatically generate work requests based on criteria in the **CMMS Configuration** settings.

Terminology: Maximo refers to the work items as *work orders*, SAP refers to these as *work notifications*, and Plantweb Optics refers to these items as *work requests*.

CMMS Requests KPI

The count of Open work requests, plus a list of assets with Open work requests. The asset list is filtered based on the current Active Filter and Message Filters settings. The **CMMS Requests KPI** includes out of service assets. The KPI includes asset and location types.

CMMS work requests

A user- or system-generated request for work to be done on an asset. Work requests can be Open (not acted on), Pending (work in progress), Closed, or Undelivered (SAP or MAXIMO did not yet receive the request).

context menus

Context menus display automatically by right-clicking on items within the DataStudio models. DataStudio offers context menus in many application window areas and provides functions related to the selected item (like, asset). Context menus can be simple (small number of actions or functions), or they can be large and nested. Disabled menu items define functions for the selected item that are unavailable at that time.

criticality

The relative risk (expressed as a number, 0 through 1,000,000) of the high costs from failure of that asset. Criticality is the relative risk of an asset from a cost perspective, calculated to understand which assets deserve attention and money to prevent failure.

Custom KPIs

Number of Custom KPI registrations using (a) assets with contributors, (b) number of contributors, or (c) value passed to KPI when a Plantweb Optics Connector registered the Custom KPI. The resulting list of assets has contributors and is filtered based on your current Active Filter.

Dashboard

The default page displayed by the Plantweb Optics Portal client. This page provides access to Health circle graph, 90-day health chart, the user's Watch List, Bad Actors assets, Recent Activities, Hierarchy of assets, Trends, Reports, selected KPIs, and Portal display and control settings.

dashboard settings

Determines what KPIs display, the applied message filtering, choice of message format (Card or grid), defines refresh duration, and selects whether to only display icons or display icons plus text.

Data Repository

A central storehouse that stockpiles acquired data using standard formats. MongoDB is the repository; an open-source NoSQL database that can scale to work with increasing amounts of real-time data. See *MongoDB*.

data source

Data sources are also referred to as endpoints. A data source exposes information, which was retrieved using Plantweb Optics Portal. Example sources are an OPC UA server, an Emerson Connector (such as AMS Machinery Manager), or a cloud service (Azure or Amazon Web Services). A data source is connected to the Plantweb Optics Data Repository through a Connector.

DataStudio

One of many client applications used with Plantweb Optics. It is designed to be a secure and singular interface to access a data source network. DataStudio provides access to your real-time and historized data. It supports an interface and customizable tools set to provide users, power users, and administrators, the features to configure and control their workspace.

Default filter

One of the User Filters assigned to display the assets of interest for this user. The default filter cannot be deleted until another filter is designated as the Default filter.

Emerson Connectors

Formerly known as an *Asset Source Interface (ASI)*. Extends Plantweb Optics by adding connectivity and communications to asset sources, such as external devices or systems. Emerson Connectors allow data to be stored and accessed in the Plantweb Optics Data Repository.

event filtering

Predefined rules that determine if an event creates a system-generated message that displays to a user. Users can receive mobile push or email notification when events satisfy a selected filter criteria, have a minimum criticality level, and meet or exceed defined severity.

events

Any occurrence in Plantweb Optics DataStudio that a service or utility wants recorded and possibly a user to react to. Certain events create a message that is delivered to users that are subscribed to receive messages for this event type. A user has access to the assets assigned by the Plantweb Optics administrator.

You can choose to receive messages for certain events, which are displayed in the Plantweb Optics. You can also choose to receive notifications on a mobile device or using email. Install the Plantweb Optics Mobile App to view and respond to messages from a mobile device.

failure effects

A filter option for assets. Failure Effects identify and organize assets according to the effects they cause when there is an equipment failure. For example, you can label a Machine type Fan with Environmental Control, if the purpose of the fan is to provide cooling to a production environment.

filtering

Feature that restricts the assets displayed based on location, class (type), responsibilities (failure effect, functions, or interface type), and criticality.

filters

Labels for categorizing system elements to allow grouping and filtering. In the Plantweb Optics DataStudio, you can label any asset with one or more of the following labels: failure effects, functions, and key interfaces.

functions

A filter option for assets. Functions describe the functionality of the asset. For example, for AMS 9420 Wireless Vibration Transmitters, you can apply the functions—Vibration, Temperature, and Analytical.

Global Filters

A group of asset filters defined by your Plantweb Optics Portal administrator that all users can employ to build their own custom filters. See *User Filters*.

grid view

A method to display messages in which the message parts are displayed like a spreadsheet. See *card view*.

guest account

A user account that is authenticated in Plantweb Optics Data Studio, but does not have an assigned user in Plantweb Optics Portal. A guest account has limitations. You cannot perform specific actions and you receive a message stating that, "User does not have access rights to this feature:"

- **Dashboard**–Watch List and Recent Activities
- **KPI List Views**–Watch List
- **Hierarchy** (assets)–New message and new work request
- **Settings**–Notifications and Message Filter
- **Filter panel**–Add and edit User Filters

Health

A dashboard display showing the number of unhealthy assets out of all assets. Health can be calculated using an average or worst-case calculation method.

health 90-day trend chart

Shows the health of assets (filtered) up to the previous 90 days. The chart shows the number of assets where health is categorized as Critical and Warning. The chart results are based on the results after applying the configured User Filter.

health circle graph

Alternatively known as a *donut chart*, this Dashboard graph is the current distribution of asset health classifications, each of which represents the number of assets in a specific health classification. The number of assets depends upon the user filter selected, properly excluded out of service assets, and the defined health classifications. You can change the display setting from Unhealthy to Good assets using the Portal Quick Settings (⚙️ icon).

health circle graph

Alternatively known as a *donut chart*, this Dashboard graph is the current distribution of asset health classifications, each of which represents the number of assets in a specific health classification. The number of assets depends upon the user filter selected, properly excluded out of service assets, and the defined health classifications. You can change the display setting from Unhealthy to Good assets using the Portal Quick Settings (⚙️ icon).

Hierarchy

The asset and location tree that defines the customer's asset organization. You can display asset health messages, properties, latest values, messages, and KPIs associated with select assets. Displays the last seven days of health values (trend) for a selected asset. It displays the asset hierarchy that mirrors the ISA-95 model hierarchy from Plantweb Optics DataStudio. This display shows all assets for which a user has access, based on the locations and security profile applied by the administrator.

historize

Select asset parameters for trending in Plantweb Optics Portal and DataStudio.

ignored assets

Also referred to as *out of service* assets. The **Out of Service Assets** report shows the current schedules and the out of service assets. You can also export ignored asset information as a *.csv file (spreadsheet).

individual health score

The health of an asset calculated using the individual health score calculation method, from the modules' health opinions reported on the asset.

interfaces

A filter option. Interfaces describe how the asset sends and receives information on the network. Examples include HART and Ethernet.

ISA-95 Model

Previously referred to as the *Logical Hierarchy*. The model helps you to create a logically compliant hierarchical asset model for all sites, units, and modules within a plant. Use this model to make changes to the asset, while keeping the assets physical devices and measurements (parameters) static. This is the logical model you use to set specific asset properties, either manually or using the bulk edit feature (MassConfig) in Optics DataStudio. See *I/O Model* for details about the asset physical devices.

join key

Allows you to log in to the Plantweb Optics Mobile or Augmented Reality client. The join key is unique to you and the application. It identifies your username and the Plantweb Optics Mobile client. The join key is valid until it is disabled in the **Settings > Admin > Join Keys** interface by the user or a Plantweb Optics administrator.

key performance indicator (KPI)

An asset list based on criteria set in Plantweb Optics to alert users of potential problems. KPIs include **Unhealthy** (assets with low health scores), **Watch List**, **System Messages**, **User Messages**, **CMMS Requests**, **Undelivered CMMS** (work requests), **Overdue Calibration**, and so forth.

language

A feature that permits you to change the language used in the Plantweb Optics Portal interface or add other language translation packages. The DataStudio interface also can use multiple languages.

left pane controls

Area of the Plantweb Optics browser screen that displays four functional areas (Dashboard, Trends, Hierarchy, and Reports), plus a list of KPIs (with or without text). You can decide which of the CMMS and Custom KPIs you want displayed.

licenses

Plantweb Optics determines customer licensing using a mixture of core-based licenses (Repository, Emerson Connectors, and CMMS) and user-based licenses (mobile join key tokens and augmented reality users).

location

A logical representation of an area in a facility. You determine how to organize your facility into locations using the ISA-95 Model in Plantweb Optics DataStudio.

message filters

Options that determine what messages a user sees based on asset event types. These filters are defined in the Plantweb Optics Portal Settings and originate from health roll-up changes, CMMS work request status changes, or events tied to assets.

messages

An asset event generated or created by a user; a message is always associated with a specific asset. Plantweb Optics Portal uses messages to collaborate between multiple users to accomplish requirements such as monitoring, inspecting, performing maintenance, or replacing an asset. Each message is assigned a severity and can contain multiple attachments with more information. Messages help users collaborate, create work requests, effectively keep your plant assets healthy.

module

A third-party data source or Emerson Data Collector that can generate system messages. You can suppress event messages from specific modules.

notifications

A mobile push or email sent to a user that meets the criteria set up in the **General > Notifications** settings. The user can receive notifications based on:

- A user-defined filter or a global filter set up by an administrator.
- A user-defined asset watch list.
- Asset criticality exceeding a defined value.
- Messages created by users, system events, or both.
- Messages with a severity that equals or exceeds a defined severity.

OPC severity range

A continuous range of OPC severity values defined by a Plantweb Optics administrator. An administrator can create up to 100 severity ranges, which all users can use in messages and to set a threshold for notifications.

out of service assets

Another term for an *ignored* asset. Assets set to ignore their unhealthy status and any generated system messages, for a scheduled interval. When an asset is removed from production for scheduled maintenance, planned shutdown, holidays, or variation in usage patterns, it is "out of service." This functionality helps users to avoid unnecessary system-generated messages from temporarily out-of-commission equipment (assets).

All users see the list of displayed out of service assets. An asset can be designated as out of service by any user with administrative permissions. Health roll up calculations are unaffected by out of service assets. Their health though continues to be updated. The KPI unhealthy asset list and Dashboard does not display out of service assets. Events from out of service assets are not generated. A user can still create a user message bound to an out of service asset.

Plant Calendar

A term no longer used in Plantweb Optics and replaced by the term *scheduler item*. Used to schedule plant activities and events such as required maintenance outages or holidays. Out-of-service assets can be tied to one or more reoccurring schedules, as long as the schedules do not overlap. See *scheduler item*.

Plantweb Optics Connectors

Collectively includes Emerson Connectors (previously called ASIs), plus Open Standards and Protocols through the Plantweb Optics Connector service.

Plantweb Optics Portal

One of the client applications that retrieves information from the Optics Data Repository to display asset tracking and trend information. The Asset View visualization features are now a part of the Plantweb Optics Portal client, including messaging, collaboration, dashboard displays, and KPIs.

polling rates

Durations between acquiring new information for events, hierarchy, parameters, and asset calibration.

Recent Activities

The **Recent Activities** displays the top five assets with the latest User Messages. The messages displayed are the results of applying the current Active Filter, the Message Filter settings, and includes all asset Class Types. Each asset's health classification is displayed with a colored bar (Red-Critical, Orange-Warning, Green-Good, and Black-Other).

recurrence pattern

How often a schedule should activate, whether hourly, daily, monthly, or yearly.

Reports

A major Plantweb Optics Portal page that displays columnar reports about key problem assets. Currently there is the **Bad Actors Report** and the **Out of Service Assets Report**. Each column in the reports can be sorted in ascending or descending order. The Bad Actors Report also can be filtered based on the previous, seven, 30, 60, or 90 days. The data listed in each report can be exported to a spreadsheet formatted file.

responsibilities

A filter that selects persona-specific functions (responsibilities) for an asset that can include failure effects, asset functionality, or interfaces.

saved filters

Filters retained from an earlier user session that can be used to filter the asset hierarchy display. Users can also access filters defined by administrators that are appropriate to this user's responsibilities.

service information

A category of object properties for an asset. Service Information contains the **Out of Service** property. You can change this property manually, with a Lua script, or using MassConfig.

severity

An event attribute that describes the urgency of an event. This can be a value within the range of 1–1000, with one being the lowest severity and 1,000 being the highest. Typically, a severity of one would indicate an event which is informational; while a value of 1,000 would indicate an event of catastrophic nature, which could potentially result in severe financial loss or loss of life. In Plantweb Optics Portal, the severities are categorized

as levels that express a range of OPC severity values. For example, Medium can denote the OPC severity range of 401-500.


spam

A Plantweb Optics process that automatically suppresses repeated events for a given asset. The administrator defines the number of repeated events allowed from an asset. Spam settings are system-wide and managed by an administrator.

system messages

Messages created for an asset that experiences a change in health or other operational constraints. These messages often result in monitoring, inspecting, fixing, or replacing the asset.

System Messages KPI

A count of the number of asset-generated messages and the asset list (from data sources or internally) that created the messages. The list is affected by the current Active Filter and Message Filters settings. The **Message Filters** settings are configured based on your requirements. Messages can be filtered by **(a)** age (7, 30, 60, or 90 days) or **(b)** event type. You can enable and disable the Message Filter by clicking the  icon.

tag (*verb*)

Notifying another user about an asset change of status or condition. Users tag one another to collaborate on monitoring, inspecting, repairing, or replacing assets.

Time since last update

The time since the Plantweb Optics Portal Dashboard was last updated with new asset health information from Plantweb Optics repository. If you hover your cursor over the last update time, the date and time of the previous Optics Portal update displays. You can change the Plantweb Optics Portal dashboard refresh rate using the Portal quick settings (gear icon). Refresh rates are 15 minutes, 30 minutes, one hour, three hours, six hours, 12 hours, or 24 hours.

Trends

A Plantweb Optics Portal page that displays up to seven asset parameters (can be from different assets). The Trends plot shows the historical parameter values and health as raw data or interpolated curves. Using this graphic you can display from one week to one year of historical information, while comparing asset functionality. You can also export the displayed parameter values to a spreadsheet csv file. Parameters can be added using the **Latest Value** tab under **Asset Overview** by selecting the **Historized Add to Trends** check box to the left of the asset **Parameter**.

Undelivered CMMS KPI

Count of Pending and Undelivered Work Notifications plus the list of assets associated with the Pending and Undelivered Work Notifications. Resulting assets are filtered based on the current Active Filter. This KPI includes asset and location class types.

Unhealthy KPI

A listing all under-performing (Critical and Warning) assets and their events. The Health tab graph shows the health score for the last seven days recorded from a selected asset. This KPI List View is **(a)** composed of assets with a **Critical** and **Warning** health

classification, **(b)** excludes out of service assets, and **(c)** is filtered based on the current Active filter.

user messages

A message created by you or a co-worker that indicates a change in the operation of an asset. Users can be notified with mobile push notification or email about user or system messages or event messages. Notifications can be restricted to messages with a set severity level.

User Messages KPI

A count of user-created messages and the assets (asset and location types) associated with user messages and the applied **Message Filters** settings. Messages can be filtered by age (7, 30, 60, or 90 days). Tool tip indicates the current number of previous days set in the Message Filter. The resulting asset list is filtered with the current Active Filter.

users

Lists of users (name, email, and profile) associated with specific Plantweb Optics feature permissions.

Watch List

A list of user-specified assets that is sent to the Plantweb Optics Portal when the your session starts. Your **Watch List** is filtered by the configured Active Filter. The **Watch List** shows **(a)** a bar chart of the health score distribution of assets (**Critical**, **Warning**, **Good**, and **Other**), **(b)** a spark line that indicates the seven-day health of the asset, and **(c)** an arrow indicating the change in asset health based on its current health value.

Watch List KPI

A list user-selected assets to monitor for health and performance. You can select any assets from within your area of responsibility to designate for the **Watch List**. The KPI count and asset list is filtered by the current Active Filter.

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