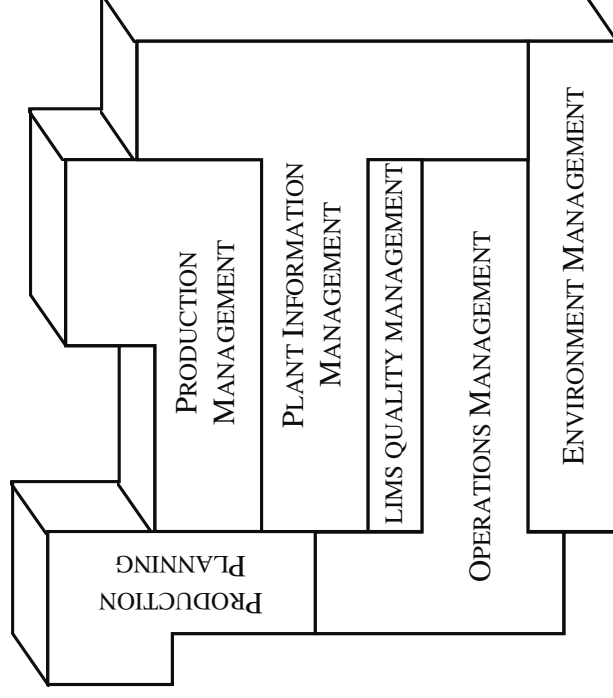


Uniformance Desktop
Locate Tags Using Tag Explorer



Lesson Objective

Objective

Using the Tag Explorer, do the following:

- Organize tags into user directories.
- Locate tags using a Tag Filter.
- Drag/drop and copy/paste tags into other applications.

Topics

- Purpose and Capabilities
- Unit Directories
- User-Created Directories
- Security
- Hands-on Exercise

Reference

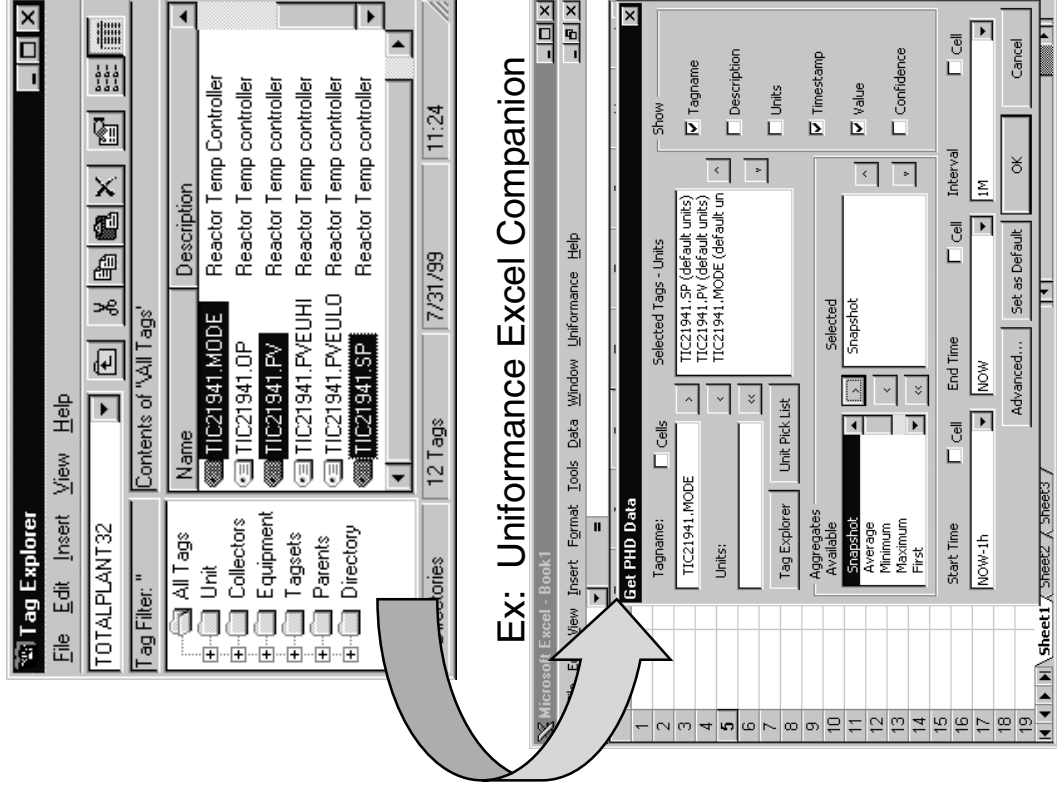
- *Tag Explorer online help*
- *Tag Explorer User Guide*, PIM2401 (documentation CD)

Tag Explorer Purpose and Capabilities

- The Tag Explorer is central to organizing PHD tags for other desktop tools.
- PHD automatically organizes tags into **standard directories**, based on relationships in the Uniformance data model.
- Users can organize (copy/paste) tags into **custom directories** within the 'Directory' directory.
- Users can **drag/drop** tags and/or directories from Tag Explorer into other applications. A delimited list of tags are dropped into the “drop target”.

Some practical examples of drag/drop targets are

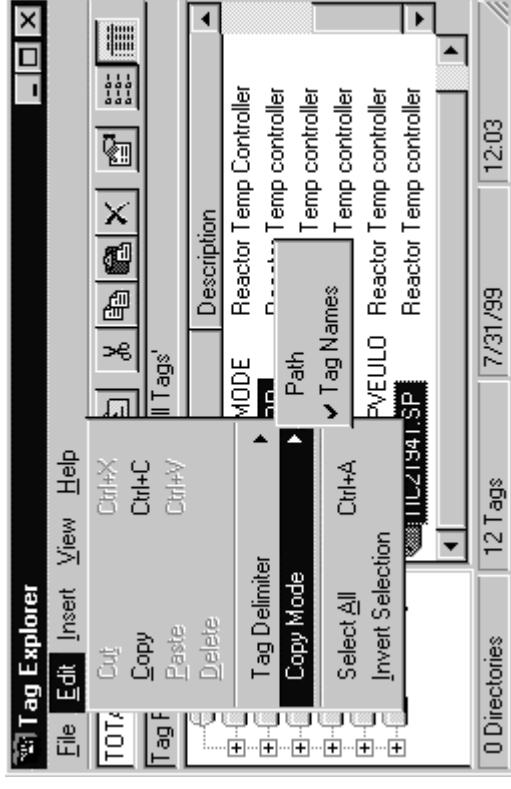
- a Process Trend plot window,
- an MS Excel worksheet,
- dialogs of the Uniformance Companion for MS Excel, and
- dialogs of the Uniformance Companion for MS PowerPoint.



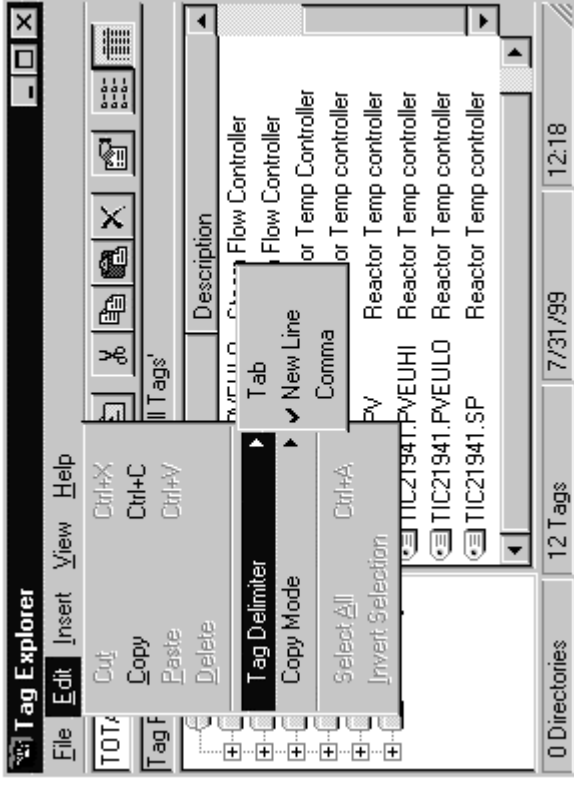
Drag/Drop

To drag tags into other applications

1. With the Copy Mode/Tag Names option checked, a delimited list of tagnames can be copied to the clipboard.
2. Select Tag Delimiter and check the delimiter you want to use to separate individual tagnames (tab, new line, or comma).
3. Open the application into which you want to drag tags.



4. From the View menu of Tag Explorer, click Always on Top.
5. Click the tag or selection of tags you want to drag.
6. Drag the tags to the appropriate area in the other application.



Copy/Paste

The **Copy** function copies the currently highlighted selection of tagnames to the Windows clipboard as ASCII text with individual tagnames delimited by characters.

The delimited selection of tagnames can now be pasted into any application that accepts ASCII text from the clipboard.

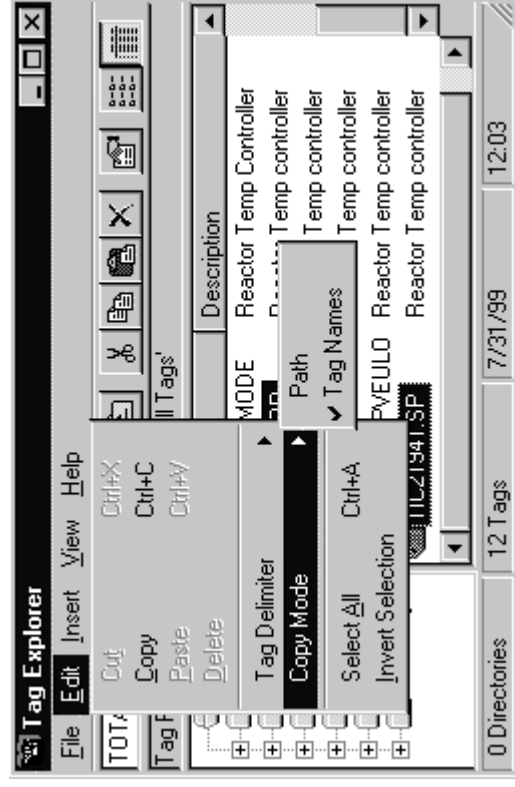
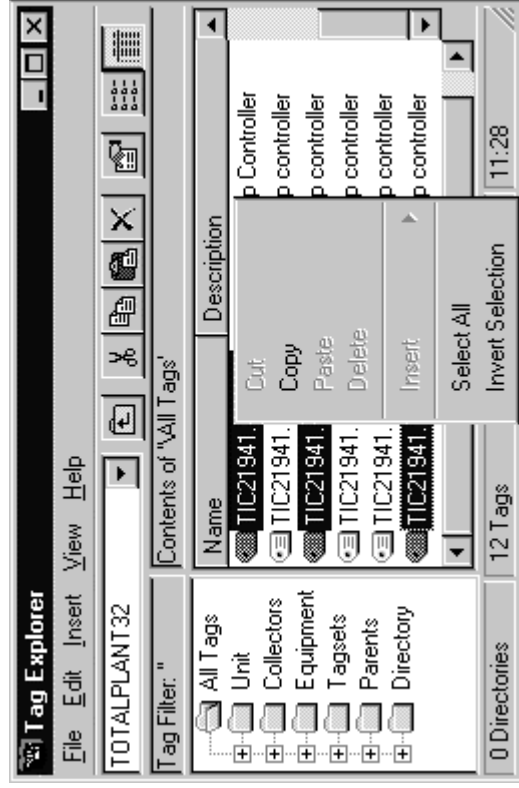
Copy Mode: There are two ways you can copy/paste directories.

Tagnames - Copies to the clipboard the delimited list of tagnames within the directory (excluding its subdirectories).

Path - Copies the directory/subdirectory path (not the tagnames).

Application example: When you need a dynamic list of tags in MS Excel

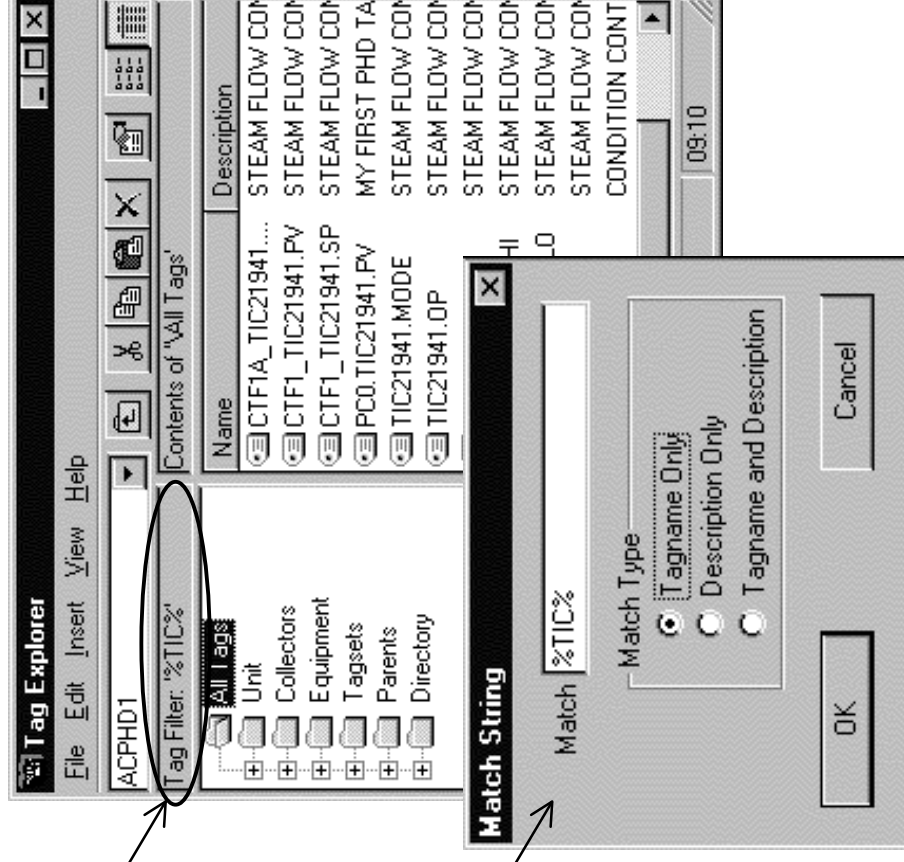
(ex: steam variables), you can copy/paste the directory path into MS Excel, instead of a list of tagnames.



Tag Filter

- You can use the Tag Filter to support searches by tagname or tag description.

Double Click the Tag Filter box to display the Match String dialog.



In the Match String dialog, type the character string you want to find.

Wildcards:

* or % for multiple characters
? or _ for single characters.

Examples:

Type %TIC% and select 'Tagname Only' to find all tags containing TIC in the tagname.

Type %STEAM% and select 'Description Only' to find all tags with STEAM in their description field.

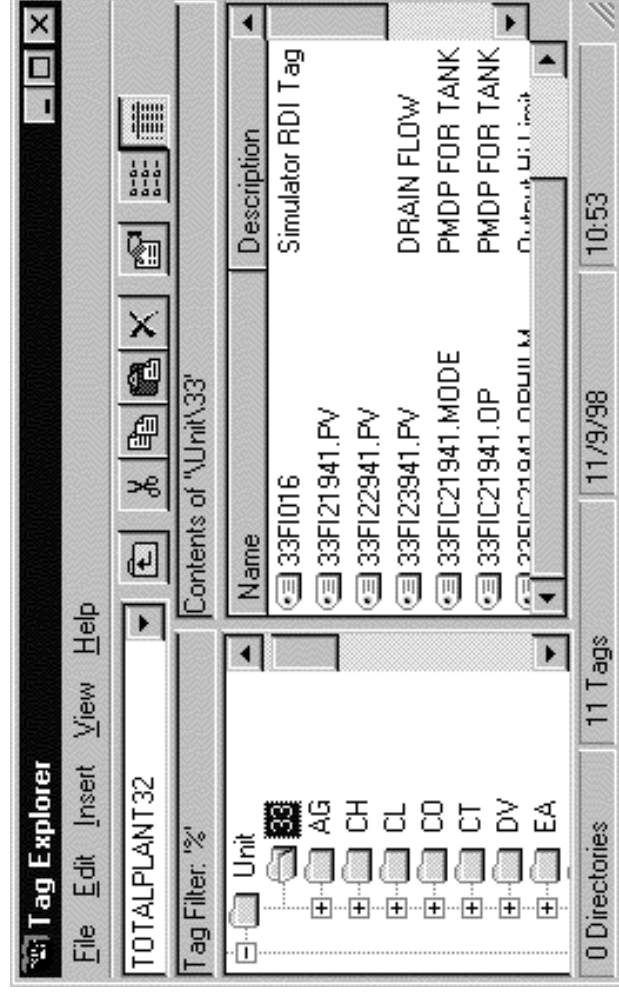
Unit Directories

- PHD automatically creates Unit directories from the **first two characters** of PHD tagnames.

The database administrator can change this choice of characters to be any fixed number of characters at any fixed location within the tagname. The database administrator accomplishes this by setting different values for these Lookup Type entries in the Fixed Plant Databook:

TAG_UNIT_START

TAG_UNIT_LENGTH



User-Created Directories

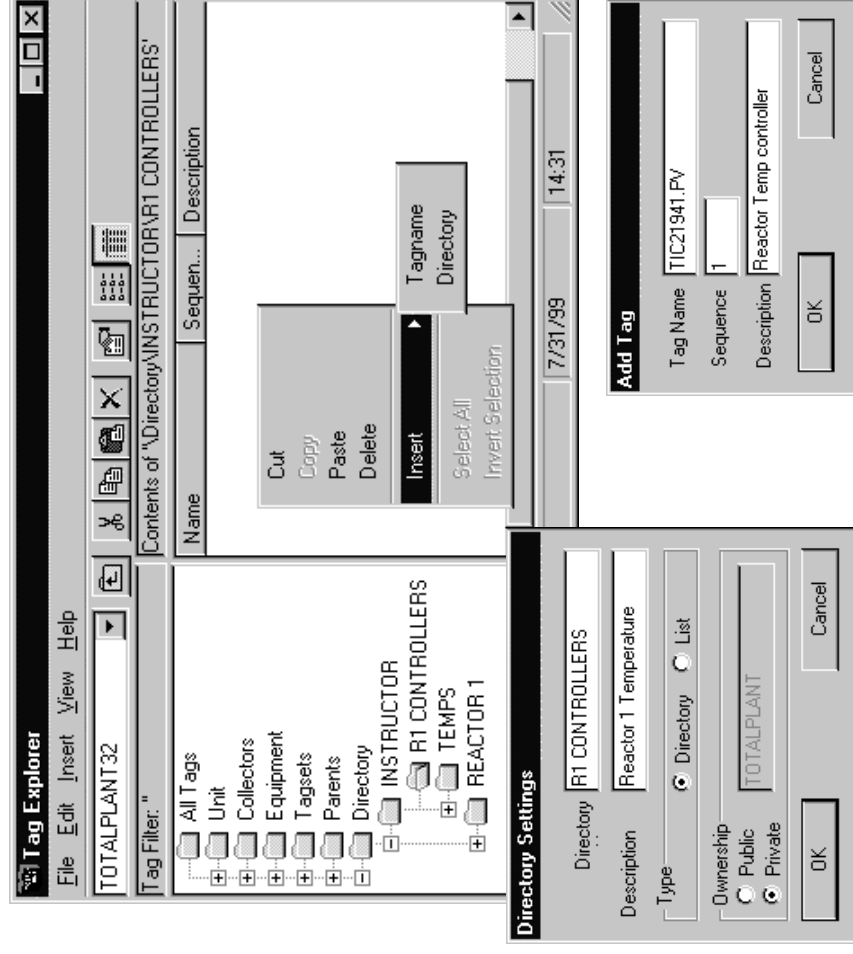
- Within the 'Directory' directory:
 - A user must have PHD read/write access (a member of the Full Permission Role) in order to create directories and lists.
 - Use copy/paste or drag/drop to place tags into user directories.
 - You cannot paste tags into the root of 'Directory;' you must create subdirectories.
 - At the time you create a directory, you set its ownership to either Public or Private:

Public - Directory can be edited (tags added or deleted) by all users.

Private - Directory can be edited only by the user who created it.

You cannot change the ownership of a directory at a later time.

The choice of Public or Private can be made at the root level only (directly below 'Directory'). Subdirectories added later will have the same ownership.

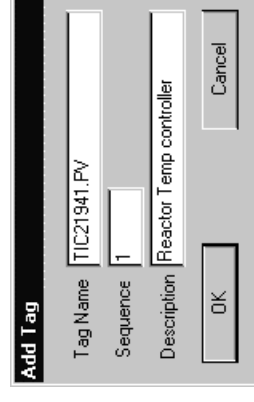
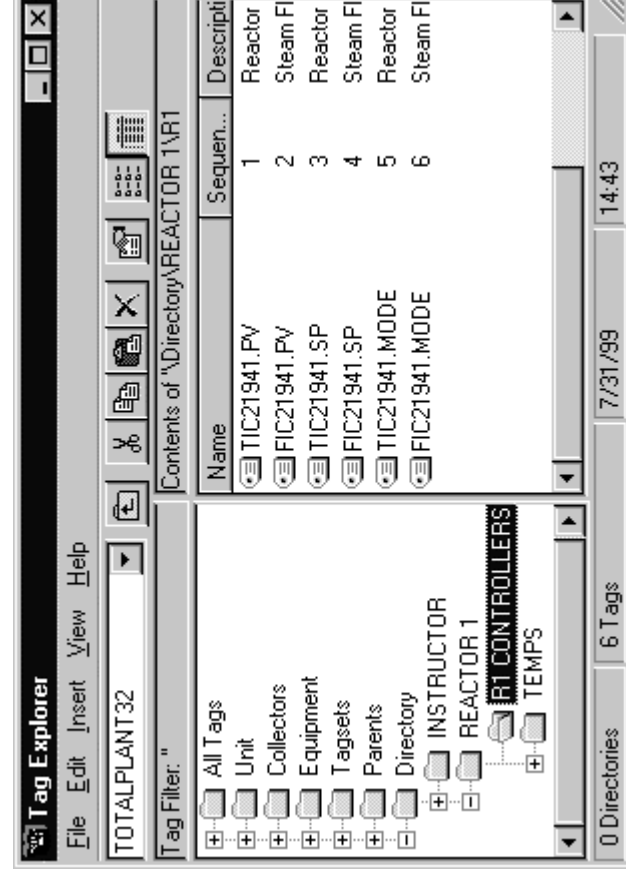


User-Created Directories, *continued*

Tags are numbered sequentially (in increments of 10) as they are added to a directory.

If you want to reorder the tags in your directory, you can modify their sequence numbers when using the Add Tag window.

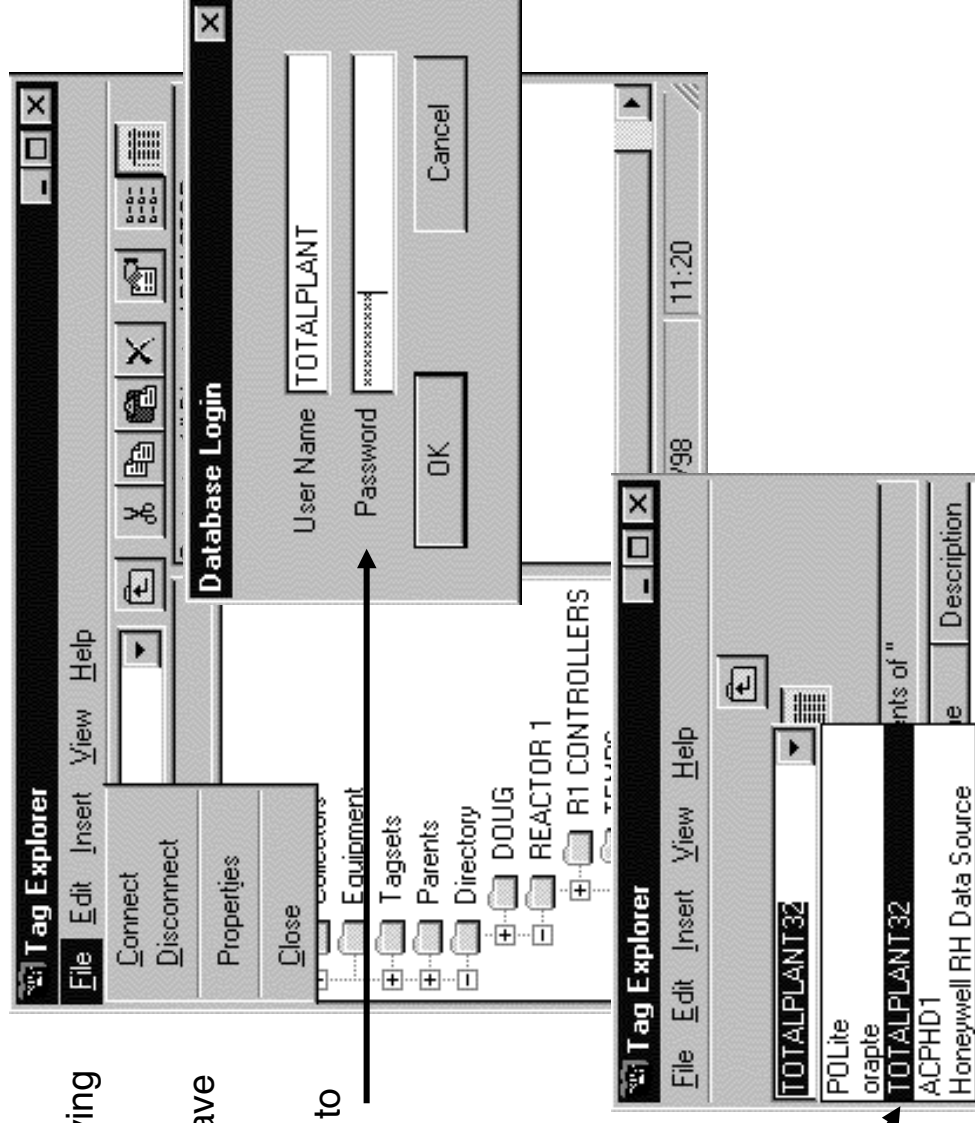
You can also change sequence numbers after the tag has been added to a directory by using the Tag Properties window.



Security

- When you start Tag Explorer and expand a directory, if Integrated NT Security (INTS) is not enabled, the user is automatically logged on as the default user 'PHD_READONLY'. If INTS is enabled, the user is logged on as the NT user. If the NT user has not been configured as a TotalPlant Information user, then a login error box appears.
- 'PHD_READONLY' allows read-only access to all Oracle tables without having an Oracle user account.
- All user names including the default have read access to all directories.
- The Connect dialog box allows a user to login to the database using a different user name and password.
- To login to a different DSN (data source name), select it from the dropdown box, then login (connect).

The dropdown box lists all available ODBC data sources on your local machine.



Hands-on Exercise

Instructions

1. Use the Tag Filter to find all PHD tags with the word “steam” in their tag description—Tag Filter: %STEAM%
2. Drag the tags from Tag Explorer into MS Excel cells.
3. Change the Tag Explorer Tag Delimiter to ‘New Line’ (Edit/Tag Delimiter), then repeat step 2.
4. Create a *private* user-directory (Right-click on ‘Directory’ directory, then select ‘Add Directory’).
5. Copy/paste several tags into the new directory.
6. Drag/drop several tags into the new directory.
7. Drag/drop a different directory into the new directory.
8. Re-sequence several tags in the new directory (double-click on the tag and change its sequence number). After changing the sequence numbers, sort the tags by sequence number.
9. Logon to Tag Explorer as a different user and try to modify the new private directory.

(You will use Tag Explorer often in other exercises during this course.)

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