



AUCOTEC
Create Synergy – Connect Processes

Engineering Base

The Assistant Auto Create Data Sheet

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1 Information on the Assistant Auto Create Data Sheet

The assistant can be used with one of the following licenses:

- **Instrumentation Basic Add-On licence**
- **Instrumentation Pro Add-On licence**
- **Instrumentation Detail Add-On licence**
- **Plant Design Add-On licence**

A data sheet contains all properties of an object used in a plant during projecting. Here the actual properties of an object are listed and, in the best of cases, the permissible minimum and maximum limit values. In this way the actual state is documented and the conditions are specified which an exchange unit has to fulfill.

The assistant **Auto Create Data Sheet** offers the possibility to import, export and to store data sheets in the project in Engineering Base. Data sheets can be created for individual functions, equipment and specifications.

When the assistant is started on a function or a function folder only the attributes of the mechanical tag with the assigned devices are output.

During the import of data sheets the object attributes in the project are updated with the attribute values from the data sheet.

When the assistant is executed, the level configuration is taken into consideration by means of which the visibility of the attributes in the project is controlled in dependence on the project phase (level).

Prerequisite

Depending on the starting point, the following sheets and forms must be present in the database and project templates for the creation of the data sheets:

- Starting the assistant Auto Create Data Sheet on a function
- **Auto Create Data Sheet** in the project templates, in the subfolder **Sheets** under **Favorites** or **Others**
- **Datasheet_Header Template.xls** in the database templates in the subfolder **Configurations**
- Starting the assistant Auto Create Data Sheet in the section Equipment or Specifications
- Auto Create Data Sheet Device in the project templates, in the subfolder Sheets under Favorites or Others
- Datasheet_Header Template_Device.xls in the database templates in the subfolder Configurations.

If the sheet templates cannot be found within the project templates, a respective message is displayed, and the templates will automatically be copied from the standard project into **Templates/Sheets/Others** of the project.

The assistant consists of four assistants:

1. [Settings](#)
2. [Create Data Sheet](#)
3. [Export Data Sheet](#)
4. [Import Data Sheet](#)

To run the assistant Auto Create Data Sheet:

1. In the Engineering Base Explorer, select a Function, a Device or a function, device or specification folder.
2. On the context menu, click **Select Assistant**.
This opens the **Assistant selection** dialog.
3. Select the desired functionality of the assistant and click **Run**.
The selected assistant is started.

2 Settings

Via the settings of the assistant **Create Datasheet**, the layout of the data sheet, the storage location of the data sheets below the documents folder can be specified and one can define, how the information on the associated devices is to be shown. The settings made are stored in configuration files in the project templates.

To run the assistant Settings:

1. In the Engineering Base Explorer, select a Function, a Device or a function, device or specification folder.
2. On the context menu, click **Select Assistant**, select the assistant (Create Data Sheet) **Settings** and click **Run**.

The dialog **Automatic Creation of Data Sheet-Settings** is opened.

Automatic Creation of Data Sheet 5.6.4

Automatic Creation of Data Sheet - Settings

Define the output location in the Documents Folder

Starting on the Equipment Folder

Equipment

Starting on the Functions Folder

Functions

Use the associated devices instead

Starting on the Specifications Folder

Specifications

Show Information of Associated Devices

Show List of Associated Devices

Show Number of Associated Devices

Layout options

Show comment of attribute

Layout options

Attribute Name: 40 %

Attribute Value: 30 %

Comment of attribute: 30 %

OK Cancel

3. Perform the desired settings.
4. Click **OK** to store the settings.

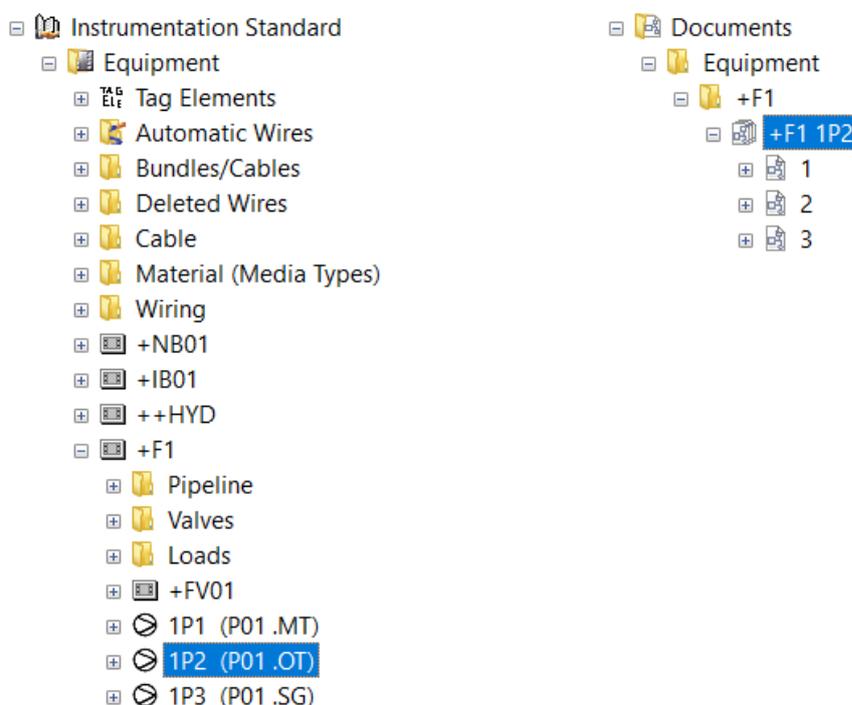
2.1 Define the Output Location in the Documents Folder

Depending on the starting point of the assistant, a subfolder of the document folder can be selected here in which the data sheets are to be stored; the structures of the project are illustrated in this process.

The subfolders functions, equipment and specifications are preset as standard. A click on  shows a selection dialog, in which a folder can be selected. New folders cannot be created in the selection dialog.

Starting on the Equipment Folder

Example:



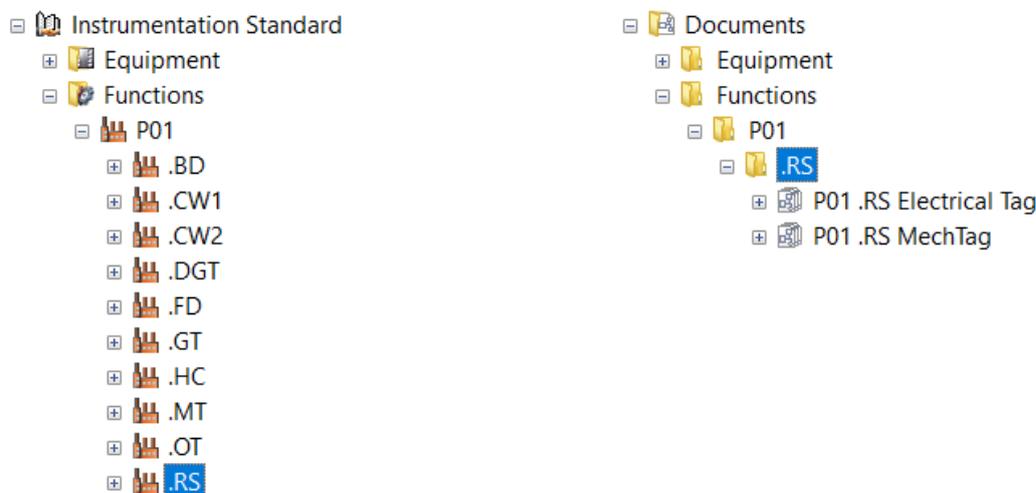
Starting on the Functions Folder

If the assistant is started on a function, another option is available:

- **Use the associated devices instead:** If this option is activated, the data is generated from the associated devices and not from the function structure anymore. Preconditions for the creation of a data sheet:
 - Start point has to be a plant
 - The type of the aggregated function has to be "Mechanical Tag"
 - The type of the associated device has to be "Machine, Aggregate (Process/Fluid)".

If this option is not activated the data is determined according to the Customizing 2.0. Thereby, it is assumed that all data lies in the functions.

Example:

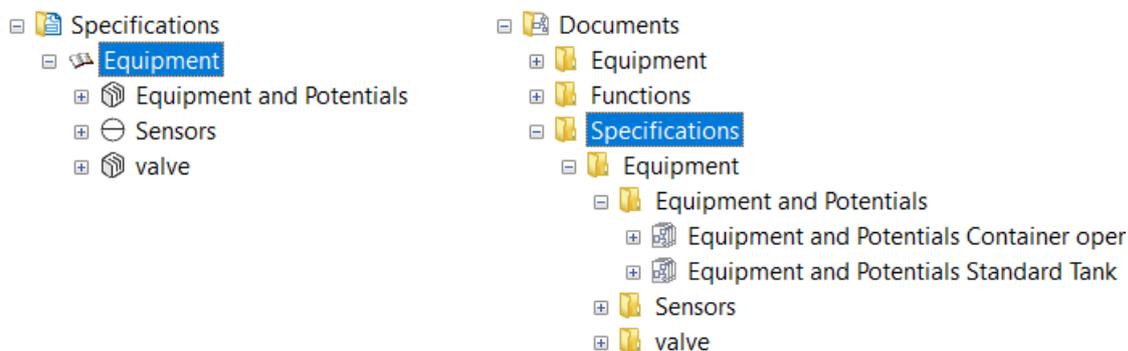


Starting on the Specifications Folder

If **Show Information of Associated Devices** is marked the following options are available:

- **Show List of Associated Devices:** A list of all associated devices is additionally shown in the data sheet which contains the data fields "Name", "Part of" and "Associated Function" of the associated equipment.
- **Show Number of Associated Devices:** The number of associated devices is shown in the data sheet.

Example:



2.2 Layout Options

With these options the layout for the data section of the data sheet can be modified.

- **Layout options:** If this option is marked, the column width can be set via percentage values. The sum of the values must amount to 100 %. If this is not the case, a message is displayed.
- **Show comment of attribute:** If this option is not activated, only the values for the columns **Attribute Name** and **Attribute Value** can be adapted.

3 Create Data Sheet

Data sheets can be created for devices, functions and specifications. Via the assistant **Create Data Sheet/Settings** a subfolder of the documents folder can be specified, in which the data sheet is to be stored. If no entries are made, data sheets are stored in the subfolders equipment, functions or specifications in dependence on the starting point.

To run the assistant Create Data Sheet:

1. In the Engineering Base Explorer, select a Function, a Device or a function, device or specification folder.
2. On the context menu, select **Create Data Sheet** or click **Select Assistant** in the context menu, select the assistant **Create Data Sheet** and click **Run**.

The assistant is started and the data sheet is stored in the folder documents.

The form sheet (Auto Create Data Sheet / Auto Create Data Sheet Device) from the sheet templates of the project is used for the creation of the data sheets.

When creating a datasheet the attributes collected below the tabs SAP and Cross-References are not displayed

Starting on a function or a function folder

When the assistant is started on a function or a function folder only the attributes of the mechanical tag with the assigned devices are output.

Starting on the folder specifications or an inferior structural level

- The data sheets are created up to the last level of the devices.
- In case of data sheets created in this section, the system attributes (tag system) are not output.
- If equipment is associated to a specification device, either the number of the associated equipment or a list which contains the data fields "Name", "Part of" and "Associated Function" of the associated equipment can be output. The output mode is specified in the assistant [Settings](#).

Starting on objects in the folder equipment or a selection in the worksheet

If data sheets are created on single devices in the equipment folder or in a worksheet, the following requirements have to be fulfilled:

- Material assignments to the process connectors of the devices are listed at the top of the sheet.
- The contents of the system attributes are output.

3.1 The Form Template Auto Create Data Sheet

By means of the form template **Auto Create Data Sheet/Auto Create Data Sheet Device** the data of the properties of the selected objects is written to the data sheets.

The heading of the data sheet can be adapted individually. The width of the columns can be modified via the assistant **Settings**.

3.1.1 Inserting Header Lines

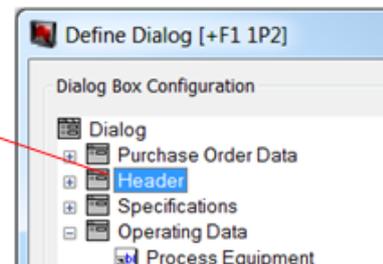
In order to structure the data header lines can be inserted. This can be executed via the function **Define Dialog** since the data sheet is a representation of the object properties. If a new dialog field tab is inserted in the dialog to which no attribute is assigned the designation of this tab is output as header line at the corresponding position in the data sheet.

Equipment:	Comment	Code:	Comment	 AUCOTEC <small>AUCOTEC AG Oldenburger Allee 24 • 30659 Hannover Telefon +49 511 61 03-0 • Fax +49 511 61 40 74 www.aucotec.com</small>	
Group:	Comment	Supplier:	Supplier		
Department:	Comment	Date:			
Plant:	Project Name	Revision:	Revision Index 1 (Project)		
Technical Specification					
Description				Data	Remarks

Example: Formsheets **Auto Create Data Sheet**, containing header and shape for data

Equipment: +F1P2	Code:	 AUCOTEC <small>AUCOTEC AG Oldenburger Allee 24 • 30659 Hannover Telefon +49 511 61 03-0 • Fax +49 511 61 40 74 www.aucotec.com</small>
Group:	Supplier:	
Department: Dosing Pump 2	Date: 02-13-2014	
Plant: Instrumentation Standard	Revision:	
Technical Specification		
Description		Data Remarks
Designation	OIL	
Type	Liquid substance	
Comment	Palm Oil	
Style for Connection	Oil	
Condition	dickflüssig	
Constitution	Ölsäure 39%, Linolsäure 11% ,Plamitins 40%, Starin 4%	
Designation	1) MeOH+N+OIL	
Type	Liquid substance	
Comment	Methanol+Nitrogen+OIL	
Style for Connection	MeOH+N+Oil	
Designation	P2	
System Attributes		
Part of	+F1	
Designation	P2	
Designation Tag Element	P2	
Comment	Dosing Pump 2	
Additional Comment		
Device Char		
Type		
Associated Function	P01_OT	
Associated Specification		
Associated HookUp		
Lock Structure	0	
Separate Potential/Substance	-1	
Protected	0	
Purchase Order Data		
Material		
Short Description		
Description		
Description (English)		
Manufacturer		
Type Designation		
Catalog Number		
Price		
Assembly Price		
UPC/EAN Number		
Header		
Specifications		
Specification		

Example: Datasheet with additional created header „Header“



Empty Tab "Header" for creating a header

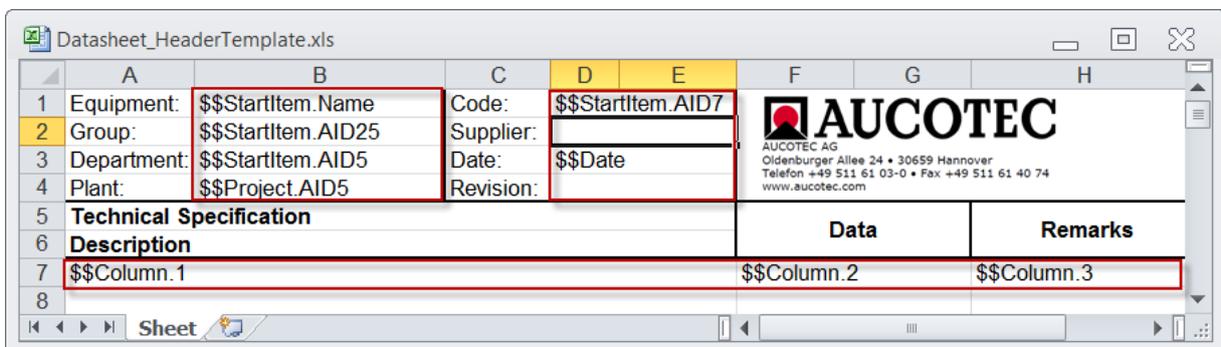
4 Export Data Sheet

EXCEL format templates are required for the export of data sheets to the EXCEL format; these templates have to be stored in the database under Templates/Configurations.

The name of the exported data sheet corresponds to the complete name of the function (e.g. P01.OT.xls), the equipment (e.g. +F11P2 (P01.OT)) or the specification. If the project was revised, the revision index is added to the name (e.g. P01.OT_Rev1.xls).

The headers of the templates **Datasheet_HeaderTemplate.xls** and **Datasheet_HeaderTemplate_Device.xls** can be adapted individually.

For the insertion of project-specific information keywords are provided which begin with "\$\$". The keywords must be entered in the lines 1 – 4 and the columns 2 (B) and 4 (D).



Example of an EXCEL Template for the data sheet export

The following keywords are predefined for the headers:

\$\$Project	Project-specific attributes are inserted, e.g. "\$\$Project.name" or "\$\$Project.AID5" for the project name.
\$\$Drawing	Inserts attributes of the drawing.
\$\$StartItem	Defined attributes of the start object are inserted, e.g. "\$\$StartItem.Name" inserts the name of the start object.
\$\$User	The current user is entered
\$\$Date	The current data is inserted
\$\$Column.x	Defines the columns in which the data is to be entered. A maximum of 3 data columns can be defined and their definition must be made in line 7 with \$\$Column.1 - \$\$Column.3. If data columns are not defined, the columns A , F and H are used as standard.

The attribute names can also be replaced by the corresponding AID.

	A	B	C	D	E	F	G	H
1	Equipment:	.OT	Code:	202		 AUCOTEC <small>AUCOTEC AG Oldenburger Allee 24 • 30659 Hannover Telefon +49 511 61 03-0 • Fax +49 511 61 40 74 www.aucotec.com</small>		
2	Group:	Palm Oil Tank	Supplier:					
3	Department:	.OT	Date:	25.03.2014				
4	Plant:	Instrumentation Standard	Revision:					
5	Technical Specification							
6	Description					Data	Remarks	
7								

Exported Data Sheet with the Function .OT as Start Object

To run the assistant Export Data Sheet:

1. In the Engineering Base Explorer, select a **Function**, a **Device** or a **function, device** or **specification folder**.
2. On the context menu, select **Export Data Sheet** or click **Select Assisant** in the context menu, select the assistant **Export Data Sheet** and click **Run**.

The File Selection dialog is opened.

3. Select the folder to which the data sheet is to be stored.

The assistant is started and the data sheet is stored in the selected destination folder.

When the export is completed, a corresponding message is issued.

5 Import Data Sheet

You can use the assistant **Import Data Sheet** to import changed data sheets, i.e. the data contained therein to a project. If the data sheet contains changed attribute values, these are then entered in the corresponding object attributes.

Data sheets which were exported from another project can also be imported.

A change of the object attributes is executed only if the data structure matches the destination project because also the source object is stored in the EXCE file.

To run the assistant **Import Data Sheet**:

1. In the **Engineering Base Explorer**, select the project to which you want to import the data sheets.
2. On the context menu, select **Import Data Sheet** or click **Select Assistant** and then select the assistant **Import Data Sheet**.

The File Selection dialog is displayed.

3. Select one or several data sheets which are to be imported. By double-click or a click on the **Open** button the import is started.

Prior to the import, a check whether the destination project correspond to the project from which the data sheet was imported is made. If this is not the case, a message is displayed.

When the import is completed, a corresponding message is issued.