

Generic HART DTM for FDT 1.2 and FDT 1.2.1 compliant frame applications Release 6.0

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Generic HART DTM

Device Type Manager for parameterization of field devices with HART capability. The Generic HART DTM executes in PACTware which has been implemented in compliance with the Field Device Tool Specification Release 1.2 or Release 2.0.

The Generic HART DTM executes with Windows XP, Vista, Windows7 and Windows8.

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1. Introduction

The Generic HART Device Type Manager (DTM) is used to parameterize field devices with HART capability. The universal and common practice commands of the HART protocol Release 5, 6 and 7 are supported, which are processed by most HART devices.

Note

Only a Microflex HART modem is allowed for hardware communication with a HART device.

Note

Software communication takes place via the HART Communication Device Type Manager (CommDTM) for the PACTware parameterization software from the member companies of the PACTware Consortium e.V. Only frame application PACTware is supported by Microflex Generic HART DTM.

Both the Generic HART DTM and the HART CommDTM must be implemented in accordance with the Field Device Tool (FDT) Specification Release 1.2 Addendum (see /1/) to allow them to be used in frame applications compliant with FDT 1.2. The Generic HART DTM additionally supports all FDT 1.2.1 functions.

Generic HART DTM Release 6 will be installed in parallel with previous releases of this DTM. All versions can therefore be used in one project at the same time. During topology scan in a plant only one release of the DTM should be enabled in the device catalog.

If the Generic HART DTM is used in the PACTware frame application Release 4.0 or higher, the device status according to NAMUR (see /3/) can be recorded and logged using the Device State Manager.

Since the Field Device Tool Specification is being continuously developed further, the component which processes the interfaces to the frame applications is also being continuously updated. This component is part of the DTM master concept which was developed by ICS GmbH and is being used in the DTMs of numerous device manufacturers.

The Generic HART DTM comprises several forms with which the functions of a DTM are processed. These include:

- Identification
- Parameterization
- Diagnostics
- Measured-value display
- Trend with archive function
- Calibration of sensor and current signal
- Printing of parameter values, diagnosis and configuration

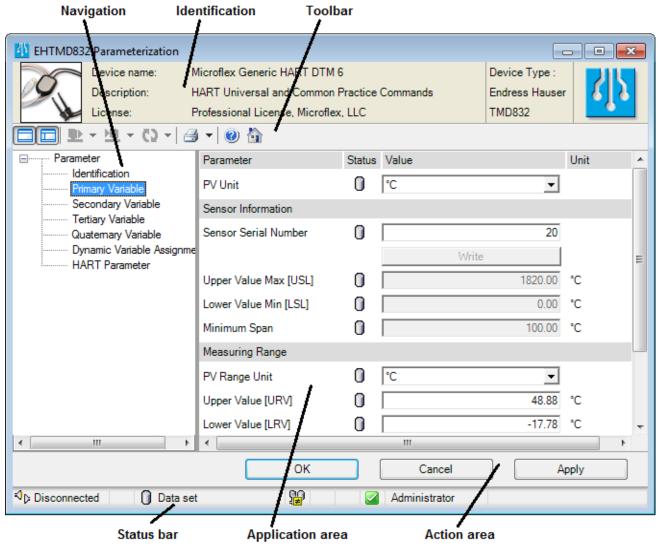
Caution: All configuration data of the DTM are protected by a signature. If these data are changed, the DTM can no longer be used. It has to be reinstalled again.

Following installation of the Microflex Generic HART DTM, all functions can be used without limitation.



2. General layout of the user interfaces

In accordance with the specifications of the DTM Style Guide (see /2/), every user interface (UI) of the DTM comprises several areas which contain general and specific data. These serve to control the display and also communication with the field device.



Identification

The description of the DTM as well as the license are displayed next to the HART logo.

Two additional columns show manufacturer and device type of the field device that is currently connected to the DTM. Values of parameters PV, SV and TV are also shown. These values are refreshed when parameters are read from the device. If the window size is reduced to the identification area a very compact display of measurement values can thus be obtained.

The company logo of Microflex, LLC is displayed on the right. The website of Microflex, LLC can be accessed by clicking on the company logo provided an Internet connection is present on the workstation.

Toolbar

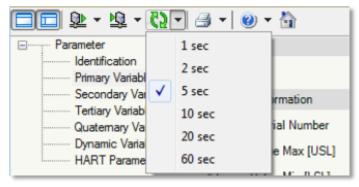
From left to right, the toolbar contains buttons for displaying/hiding the navigation and identification of the DTM, for reading parameters from the field device or writing parameters to it, for starting cyclic updating of the parameters, for printing parameter lists, and for opening the online documentation.



When reading, writing and printing the parameters, a menu can be used to select the quantity of processed parameters in order to save transmission time or to provide a compact print preview. The respective directory or subdirectory refers to the selected nodes in the navigation tree of the window.

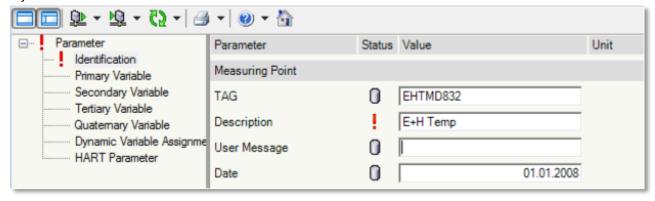


The cyclic updating rate is also set using a menu. Only parameter values displayed in the current directory are refreshed.



Navigation

A navigation tree for selecting the parameter directories of the DTM data record is shown on the left next to the application area. Switching between the directories is possible using the mouse or the cursor keys on the keyboard.



If parameters have been changed in a directory, also incorrectly, this is indicated by an icon in front of the directory. The display of incorrect changes has priority.

Application area

The application area displays the respective group of parameters which has been selected via the context menu of the DTM in the frame application (e.g. PACTware) or via a node in the navigation tree. In addition, or alternatively, help information or special functions such as a wizard (see Section 8) can be displayed.



Action area

The following 3 buttons are displayed in the action area if the application area contains parameters which can be changed:



The changes are imported into the local data record using the **OK** button, and the window is closed. **Cancel** is used to reject the changes, and the window is closed. **Apply** is used to import the changes into the local data record, and the window remains open.

Modified parameters are only sent to the field device by clicking on the **Write parameters to device** symbol. In order to write parameters into the data record of a project, the corresponding function of the frame application must be used.

If no parameters can be changed in the application area, the action area only contains one button:



Status bar

In this part of the GUI, the status of the DTM is displayed summarized in 8 fields. A tooltip in the language of the frame application is displayed for each field, and explains the meaning and current status.

The fields from left to right are explained in the following table:

Field 1	Connection status between DTM and field device
Separated	No communication possible between DTM and field device
Standby	Connection between DTM and field device can be made
Validate	Field device type being checked
Connected	Communication possible between DTM and field device
Disturbed	Communication interrupted between DTM and field device
Field 2	Communications status
Empty	No communication
65	Communication running
Field 3	Data source
O Data set	Data record of DTM
Device	Data from the field device
Device/data set	Data from the field device and the data record of the DTM



Field 4	Status of the data record
empty	Data records of DTM and field device are identical
Æ	Data records of DTM and field device are different
Field 5	Common status of parameters
1	At least one parameter is faulty
1	At least one parameter has been changed
Field 6	empty
Field 7	NAMUR status of field device
a	Diagnostics passive
8	Device error
\(\theta\)	Maintenance required
^	Outside the specification
	Diagnostics active, device OK
•	Device undergoing maintenance
Field 8	User role

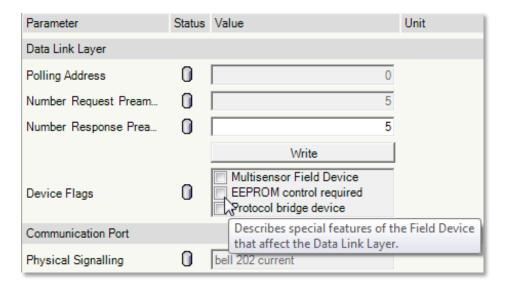
A progress bar is displayed temporarily during data transmission between the DTM and field device.



3. Parameter display

Display and processing of parameter values are available corresponding to the DTM Style Guide (see /2/).

The components of the parameter display are output in the list of parameters in the application area. Help text for each parameter is displayed as a tooltip as well as in a window by using the F1 button



Parameter

The parameter name is displayed in the currently set language.

Status

The status of a parameter can assume the following values:

į.	Invalid input or error when writing the parameter to the field device or reading it from the field device. Is described in more detail in the tooltip.
1	Parameter was changed correctly
62	Parameter is being cyclically updated
0	Parameter from the data record of the DTMs
<u>0</u>	Parameter has been read from the field device

Value

The value is displayed differently depending on the data type. The display is in compliance with the Windows Style Guide

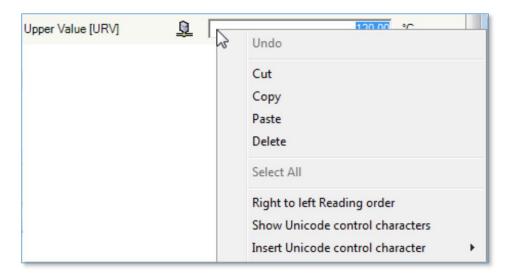
Unit

The unit is obtained from the list of HART units (see XMLUnitTables.xml).

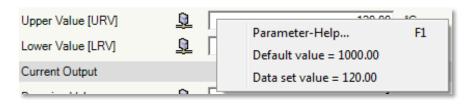


Two pop-up menus are offered in addition.

The standard menu corresponding to the type of displayed value is opened in the pop-up menu of the parameter value following selection of the field. Various menus may appear here in the language of the operating system depending on the configuration of this system.



Depending on the type of parameter, a number of preset values for it as well as the option for calling help text appear in the pop-up menu which is accessed using the parameter name.





4. Identification

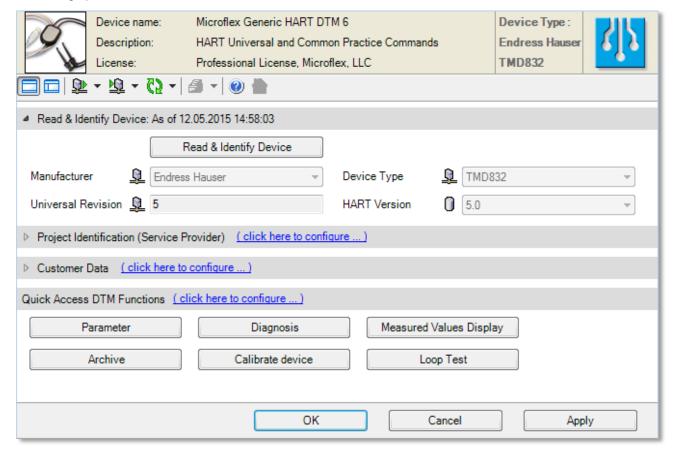
Function **Identification** of a DTM is called per default by double click on the DTM within the project tree of a frame application. In case the default function was defined different using Configuration, the **Identification** can be found in the submenu **Additional functions** of the device menu.

Working with a device can be started using this function.

The window shows three areas:

- Manufacturer and type of the device and version of HART protocol supported by the device
- Project data for documentation of the work with the field device
- Buttons for direct call of DTM functions

For saving space the first and second area can be minimized.



Identify device

Pressing the button **Read&Identify Device** all device data are read out from the device. If available manufacturer and device type are displayed. If these data are not provided by the device because e.g. the device is not listed by the HART Foundation, the fields are left empty.

If the connected device supports HART 7 protocol an additional button may be displayed that can be used for identifying the device in the plant by a prompt in its display.





Project data

Commissioning of new field devices in a plant is often executed by external service providers. For documentation of work documents can be printed using the Generic HART DTM that contain data of the project and the service provider.

Project data are defined using the function **Configuration** and are displayed in this table.



Customer Data

All data for localization of a field device are collected in this table in order to get a clear assignment of all documents that are printed by the DTM.

Customer data are defined using the function Configuration and are displayed in this table.



User defined DTM functions

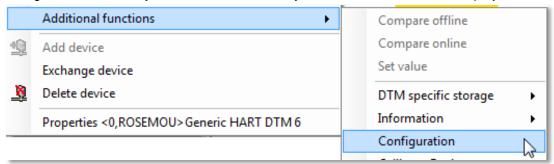
Up to 8 DTM functions can be assigned to buttons for immediate call of often used functions. Buttons are defined using the function **Configuration** and are displayed in this table.





5. Configuration

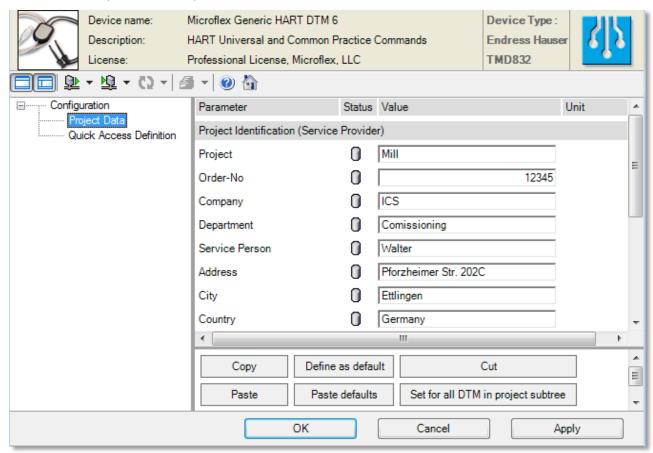
Configuration is called by DTM context menu entry Additional functions in the project tree.



Three groups of DTM functions and data can be configured:

- Project and customer data
- Buttons in the window of the Identification function
- Options for function declaration

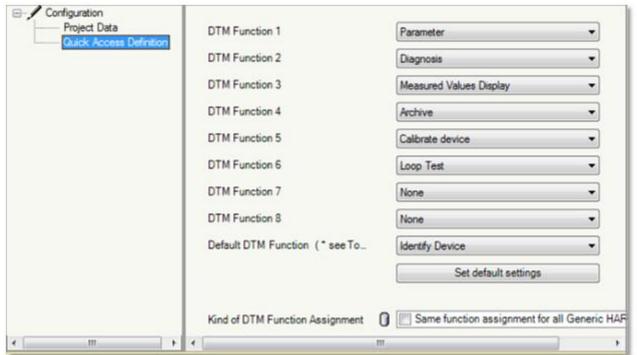
Project and customer data are text values that are valid for one or all DTM instances within a project. They are added to the printout of the parameter list and are stored with the DTM data.



Using **Copy** and **Paste** buttons copies project and customer data from one DTM to another. A data set can be defined as default and used for some DTMs. **Set for all DTM in a project subtree** copies the project and customer data set to all DTMs in the referenced project structure.

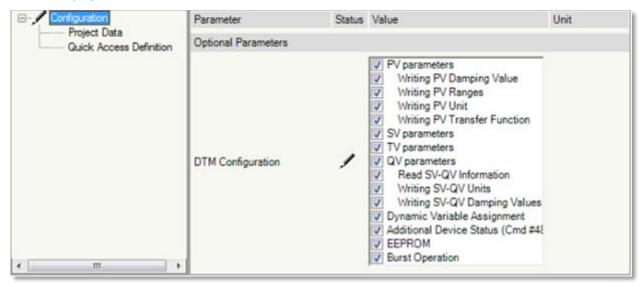


From 4 to 8 function buttons can be configured. All DTM functions are allowed for assignment. Functions (e.g. calibration) that can only be executed when DTM and device are connected with each other can only be called in the **Identification** window if the device is connected.



In addition a DTM function can be set to default that is called by double click on the DTM in the project. It can be declared whether the default function is valid for one DTM instance only or for all DTMs within a project.

Within the list of optional parameters on the **Configuration** page only those parameters are checked that shall be displayed and therefore can be edited in the **Parameter** function windows.



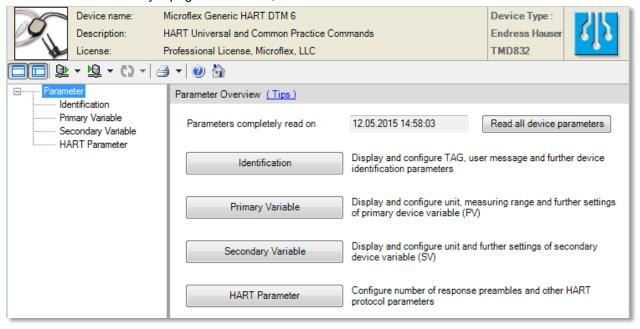


6. Parameterization

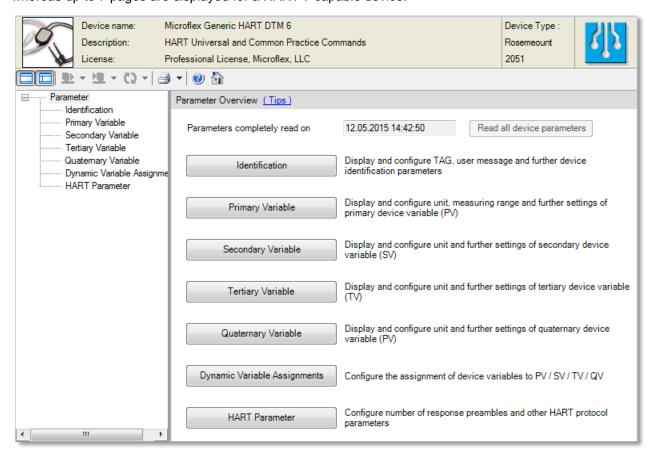
The **Parameter** function allows the display and modification of all parameters of the field device which can be processed using the Generic HART DTM.

According to the HART protocol version and the options defined by function **Configuration** a different number of pages are provided.

For a HART 5 device only 4 pages are shown,

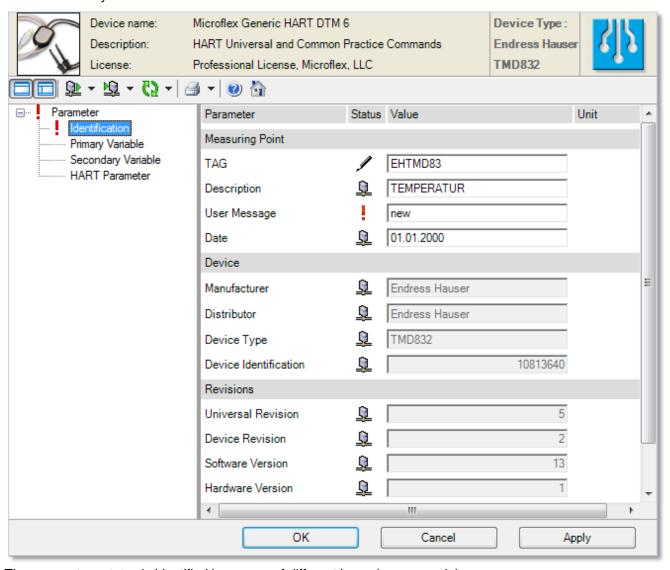


whereas up to 7 pages are displayed for a HART 7 capable device.





The first directory shows the device identification:



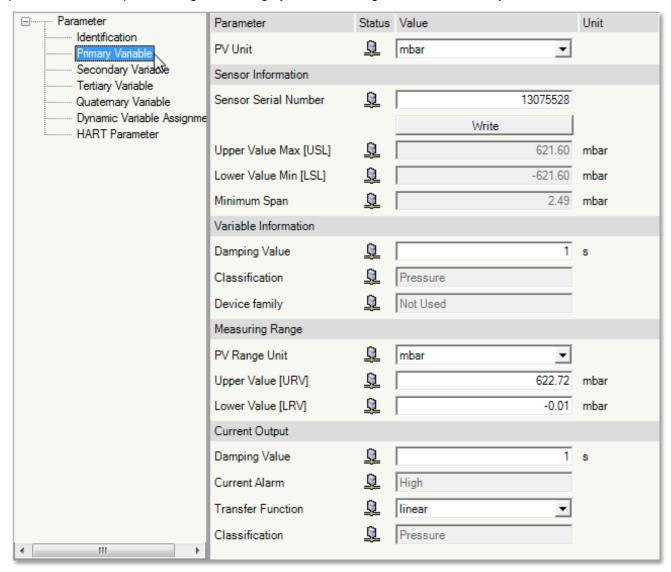
The parameters status is identified by means of different icons (see example):

- · The description has been changed
- The user message contains an incorrect character (only upper-case and special characters are permissible, see tooltip)

All other parameters have been – according to the HART protocol version used - read out of the device. The navigation area and the status bar indicate that an error is present in the data record of the DTM.



Parameters of the Primary variable are displayed in the second page of the function Parameter. Some of the parameters can be protected against editing by function Configuration. The directory can be hidden too.



Whereas the sensor limits are defined by the device and therefore cannot be changed, the measuring range limits can be defined by the user.

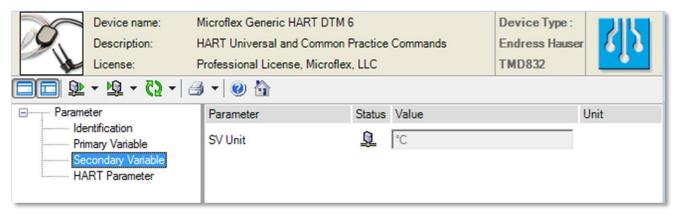
The unit for the measured value can be selected from the list of HART units. The selected unit is used for all limits and the span. It also appears in the measured-value display and in the trend.

The Sensor Serial Number can be changed if permitted by the device.

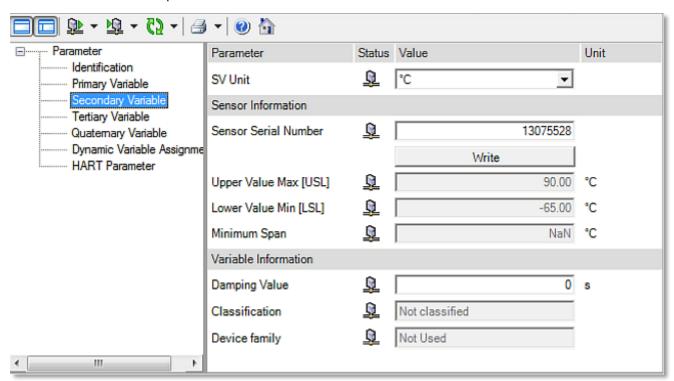
Damping value, Current alarm and transfer function can be defined for the current output of the device.



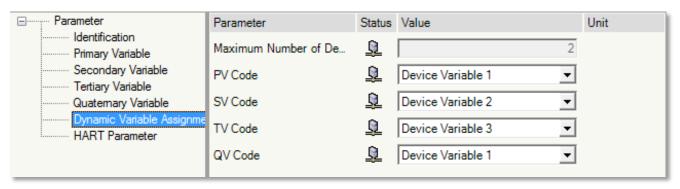
Depending of the properties of a device a second, third and fourth variable can be parameterized. A HART 5 device provides a second variable only,



whereas a HART 7 device provides 4 variables.

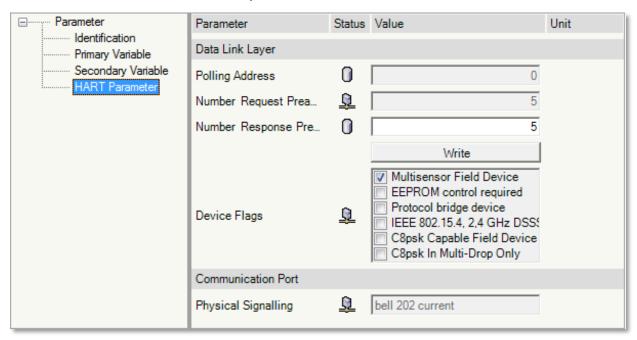


If a device provides more than 4 variables, an assignment of device variables can be defined for the four standard variables PV to QV.

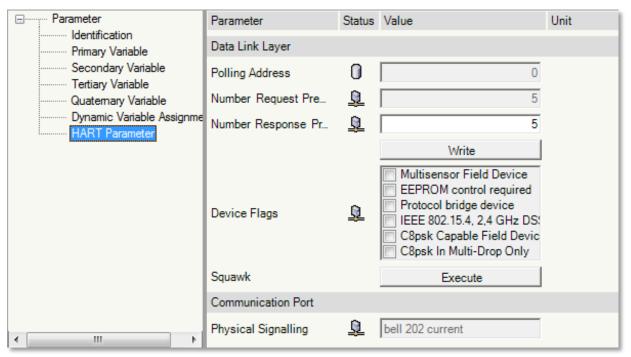




The protocol parameters of the HART interface are configured in the last directory. The polling address is written with the HART CommDTM. Some parameters are not stored in the field device.



Some HART 7 device may provide a function for identifying the device in the plant by a noise or message in the display.

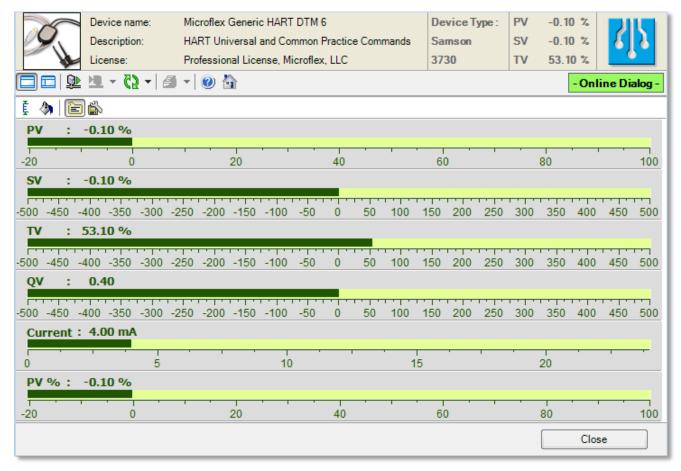


Some field devices have an EEPROM for parameter backup to ensure that the values are still present following a power failure.



7. Measured-value display

Four variables and the current output value are displayed together in a bar diagram. The primary variable is additionally displayed as a percentage.



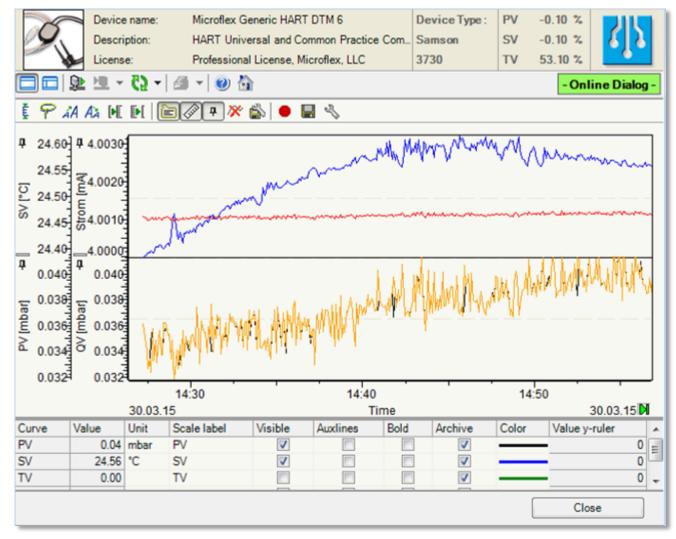
Using the keys in the toolbar of the measured-value display it is possible to capture the measuring range, to set the font size and colors for the bars, and to save these. The tooltip for the scales can be switched off.

The measured-value display can be updated once or cyclically. The cycle time can be set from 1 to 60 seconds.



8. Trend with archive function

The current output value and the four dynamic variables can be recorded cyclically in a diagram and saved in a csv file or Microsoft ACCESS database.



Three tool groups are present in the toolbar of the archive function.



These contain the following tools from left to right:

1. Display of trend chart

Measuring limits and units are read from the device

The curves are captured and displayed optimally. Scales are adapted accordingly.

AA Aa The font size for the scale inscriptions can be changed.

The distance between the scale and the inscription can be adjusted.



2. Functions of the trend chart

Switch tooltip for scales and curves on/off.

(ji)

Switch ruler on/off. With the ruler switched on, the measured values are displayed at the current position of the ruler in the **Value** column in the table.

ф

Switch scale arranging on/off. The positions of the scales can be changed when this function is switched on.

X

Curves in the trend chart are deleted.

名

The settings of the trend chart are saved.

3. Curve archiving

As long as the cycle is switched on, measured data are recorded and displayed in the trend chart.



If curves from the previous recording are still present in the trend chart, they are deleted. The recorded measured data are archived directly in a csv file or a database. This mode is recommended if archiving of the measured data takes place without supervision.

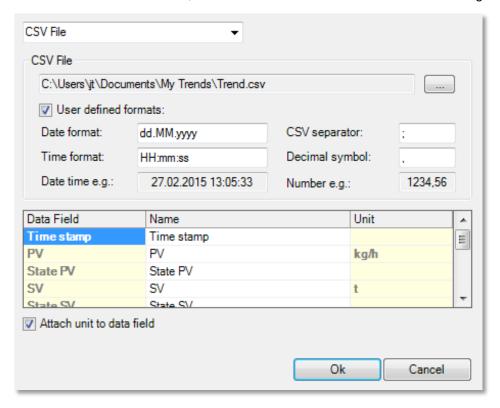


The recorded curves can be saved. This function can be used as an alternative to direct archiving.

The display of the curves and the inscription of the scales can be changed in the table positioned underneath the trend chart. If the Unit of a measured curve is changed, the scale in the trend chart is adapted accordingly.

As soon as recording of curves is started or continued, the units read from the device are applied again.

If a new archive file is created, the format of the recorded data can be set using the following form:

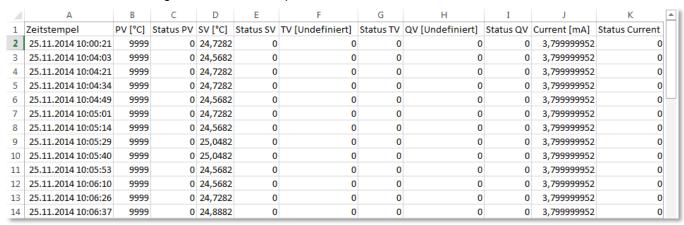




The setting of the appropriate list delimiter is particularly important for the further processing of archived data from files with csv format. The time, data format and decimal delimiters are defined by the respectively used Windows version. The measured data can also be saved in Microsoft ACCESS databases.

The **Archive data record buffer** tool can be used to write the data collected in the trend chart into the specified file.

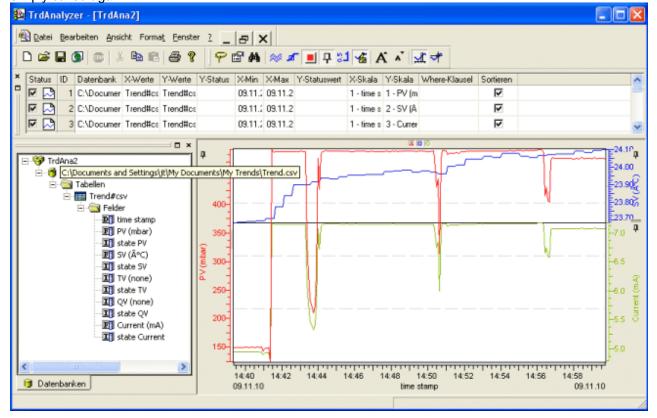
The archive has the following contents, for example:



The **TrendAnalyzer** software tool is particularly suitable for analyzing or documenting archived curves. For example, if measured curves are to be repeatedly recorded and documented

- during the development of field devices,
- · during production processes or for quality assurance, or
- in the case of guarantee claims,

either the archive is transferred to the TrendAnalyzer by drag and drop or the corresponding project file is simply called again.



Further information on the TrendAnalyzer is available at www.trendanalyzer.de.

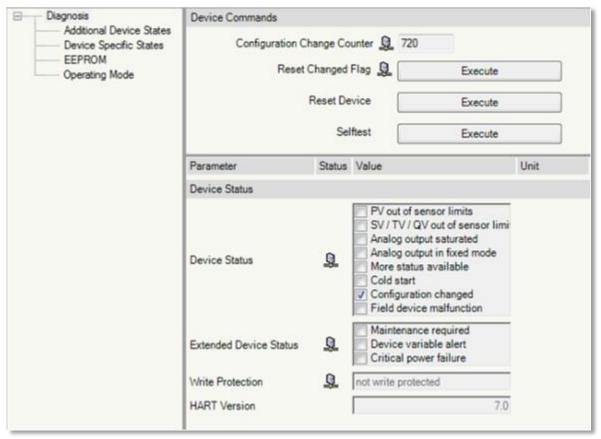


9. Diagnostics

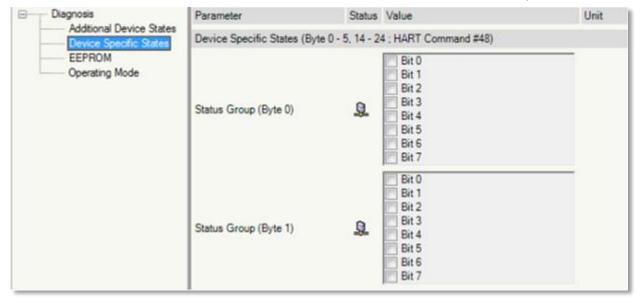
The diagnostics function indicates the status of the field device. The maximum possible scope of status information is read, even if not supported by every HART field device.

Status information can be read once or cyclically.

This application additionally offers commands with which the field device can be reset or tested.

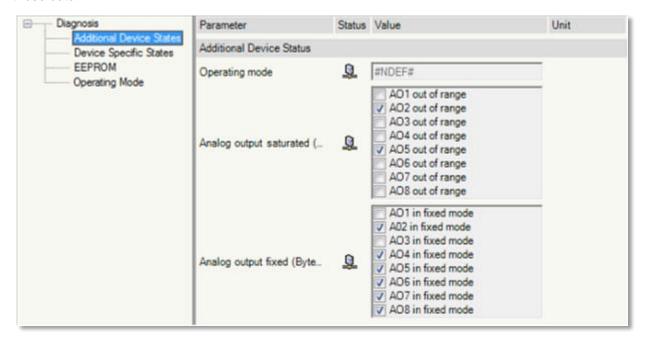


The following page shows status bits from 16 status groups with 8 bits each. The meanings of the bits are different for each field device, and must therefore be obtained from the device descriptions.



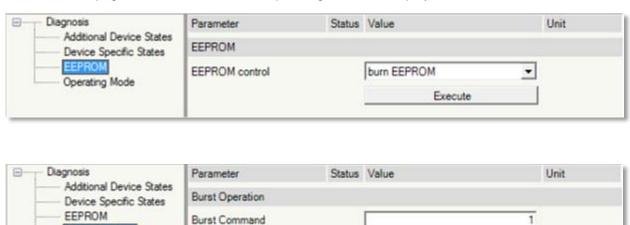


More status information according to device type may be displayed, provided that a device delivers those data.



On the last two pages EEPROM control and operating mode are displayed and can be executed.

Burst Mode



off

Execute



10. Calibration

The calibration is called e.g. using the context menu of the DTM in the frame application by means of the entry Additional functions -> Calibrate device.

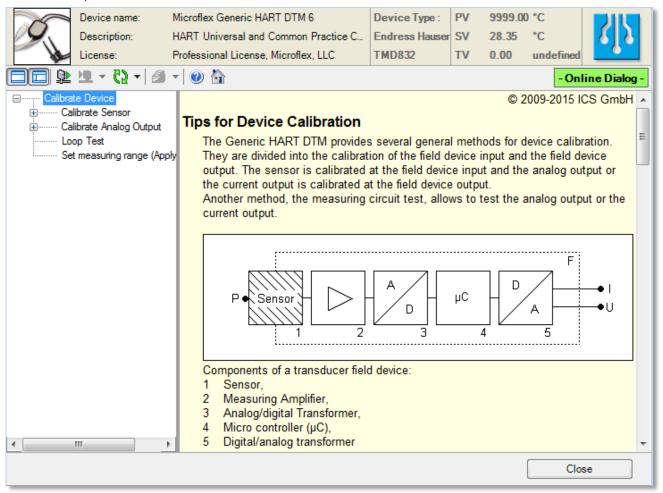
The calibration can only be started if a connection exists to the field device. Furthermore, a

Professional license is required after the test period (30 days). The DTM offers 5 calibration methods:

- 2 sensor calibrations (sensor adjustment, zero adjustment)
- 2 calibrations of the analog output (digital/analog adjustment and scaled digital/analog adjustment)
- Measuring circuit test

The calibration methods are initially explained in an overview. The individual methods are described in detailed documentation which guides the user through preparation and implementation of the calibration steps.

A wizard is provided for each calibration with which the required steps can be carried out similar to with a Device Description on the handheld:



Each calibration can be repeated several times in succession.

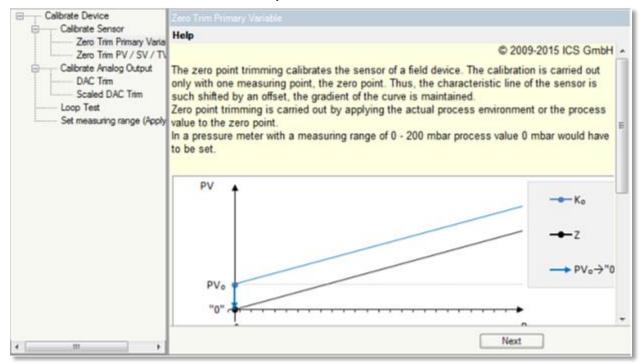
If a calibration is aborted, a note appears which guarantees correct termination of the calibration.

An error message appears if one or more calibration methods are not supported by a field device.

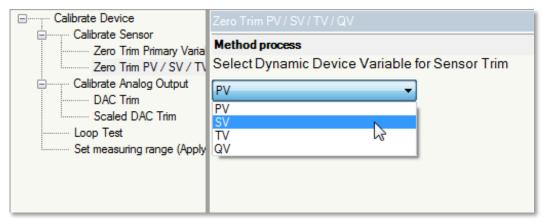


10.1. Zero adjustment

The characteristic line of a sensor is shifted by an offset.



If another variable of the device is selected...



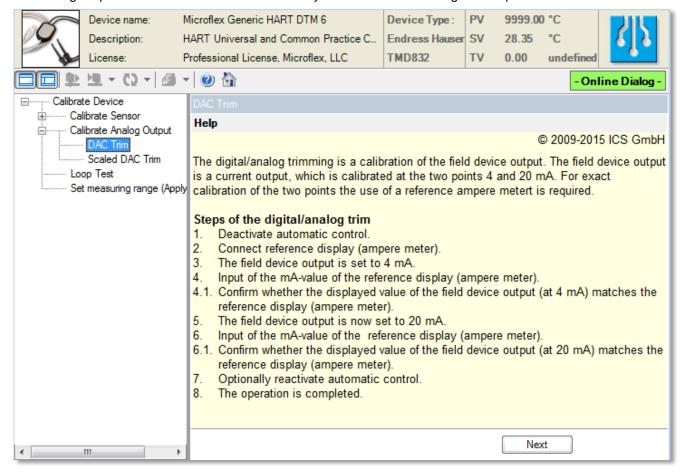
... an error message may occur in case the variable cannot be calibrated.





10.2. Digital/analog adjustment

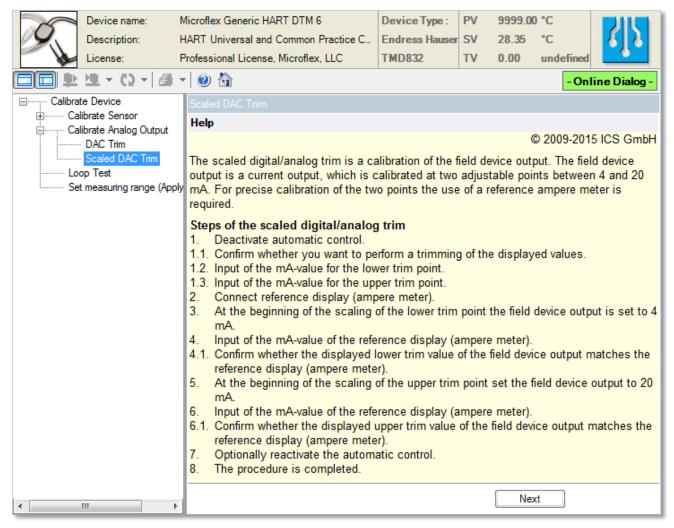
The analog output of the field device is calibrated by means of the following two sequences.





10.3. Scaled Digital/Analog adjustment

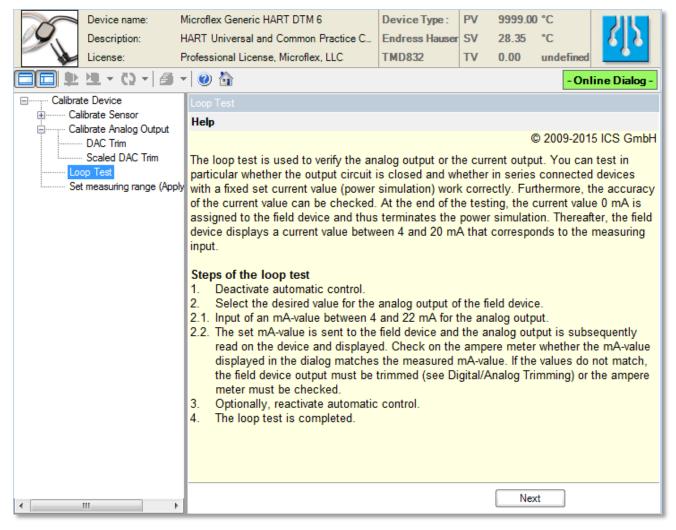
The analog output of the field device is calibrated to range limits other than the standard values of 4 and 20 mA.





10.4. Loop test

The loop test checks whether the output circuit is closed and whether the accuracy of the current values is sufficient.





11. Save/load parameter data record

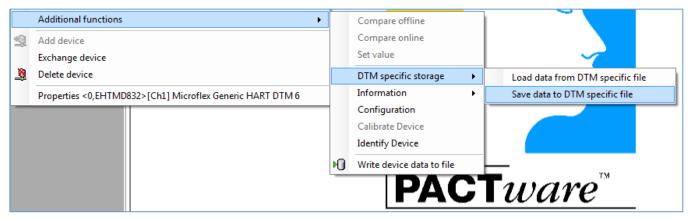
The parameter data record of a field device which is processed using the Generic HART DTM can be saved as a file.

Caution: If a field device possesses parameters which cannot be processed using the general HART commands, these are then missing in the saved data record.

The following applications are thus supported:

- Save the parameter data record of a field device in a different field device
- · Archive and document the parameter data record of a field device
- Transfer the parameter data record of a field device from one frame application to another

The function is called e.g. using the context menu of the DTM in the frame application by means of the entry **Additional functions -> DTM-specific storage**.

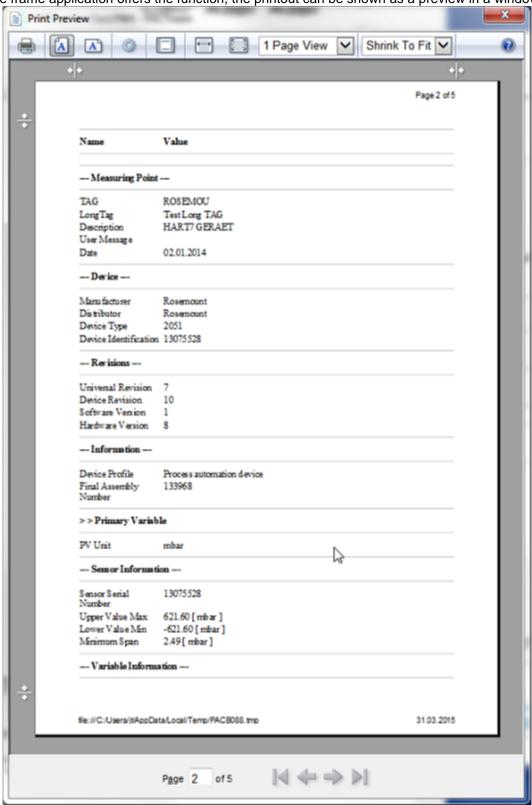


The data are saved in binary form and can only be read in again using the Generic HART DTM.



12. Printing of parameters

All parameters or a subset of the parameters can be printed together with the name, value, description, and status. If the frame application offers the function, the printout can be shown as a preview in a window.



To allow the preview, Microsoft Internet Explorer Version 5.0 or later must be installed on the PC.



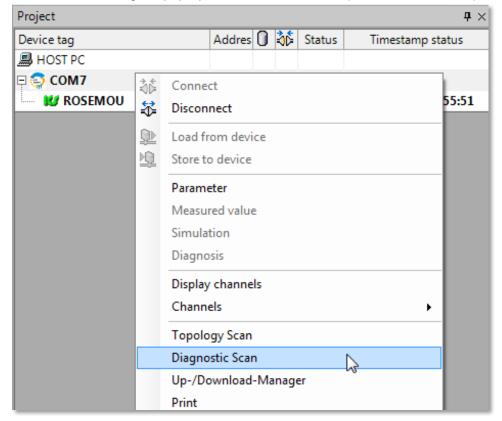
13. Display and log NAMUR device status

The current status of the field device - in other words, the last read status - is displayed in the seventh field of the status bar.

The PACTware frame application additionally allows direct reading out of the device status in the Addin project with display of a time stamp in accordance with the NAMUR directive.

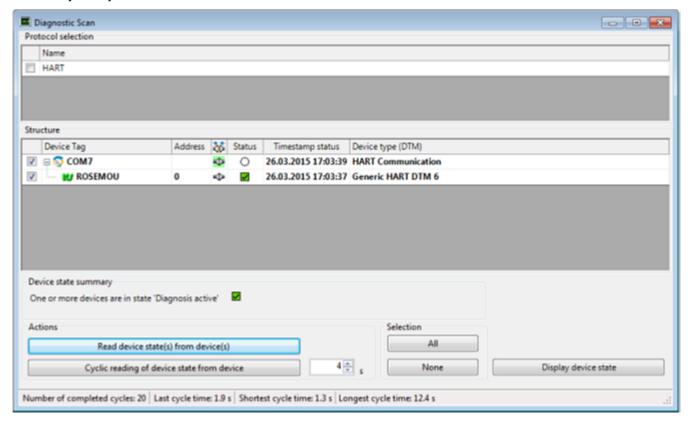


The Diagnostic Scan Addin is called using the pop-up menu of a CommDTM (communication DTM).

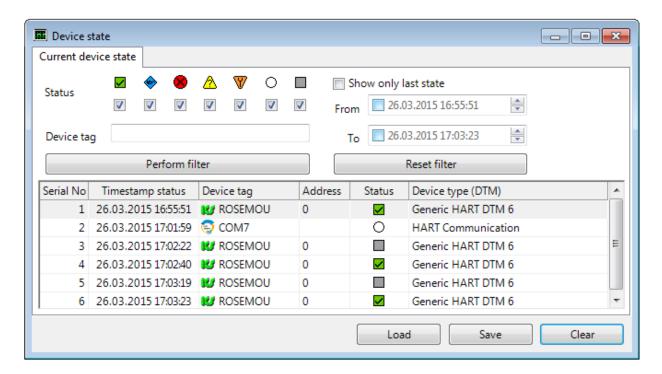




By means of the window which is thus open, the NAMUR device status is read out, displayed and logged once or cyclically for all DTMs connected to the PC via the CommDTM.



The log lists the changes in status for all scanned field devices. The log can be saved for documentation of the system status.





14. References

- /1/ FDT Group: FDT Interface Specification Version 1.2 Order No. 0001-0001-001, see also www.fdt-group.org
- /2/ FDT Group AISBL Guideline: Device Type Manager Style Guide Version 1.1; FDT Group Document No. 0001-0008-001
- /3/ NAMUR Worksheet Status Signals of Field Instruments, NE107, Version 12.6.2006