Wonderware

InTouch® HMI SmartSymbols Guide

8/26/14

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Welcome

This documentation describes how to create and manage reusable InTouch graphics, called SmartSymbols.

To get the most benefit from this documentation, you should have a basic understanding of the InTouch HMI and WindowMaker.

This documentation assumes you know how to use Microsoft Windows, including how to navigate menus, move from application to application, and move objects on the screen. If you need help with these tasks, see the Microsoft Help.

You can view this documentation online or you can print it, in part or whole, by using the print feature in Adobe Reader.

Documentation Conventions

This documentation uses the following conventions:

Convention	Used for
Initial Capitals	Paths and file names.
Bold	Menus, commands, dialog box names, and dialog box options.
`Monospace`	Code samples and display text.

Technical Support

Wonderware Technical Support offers a variety of support options to answer any questions on Wonderware products and their implementation.

Before you contact Technical Support, refer to the relevant section(s) in this documentation for a possible solution to the problem. If you need to contact technical support for help, have the following information ready:

- The type and version of the operating system you are using.
- Details of how to recreate the problem.
- The exact wording of the error messages you saw.
- Any relevant output listing from the Log Viewer or any other diagnostic applications.
- Details of what you did to try to solve the problem(s) and your results.
- If known, the Wonderware Technical Support case number assigned to your problem, if this is an ongoing problem.

Chapter 1

About SmartSymbols

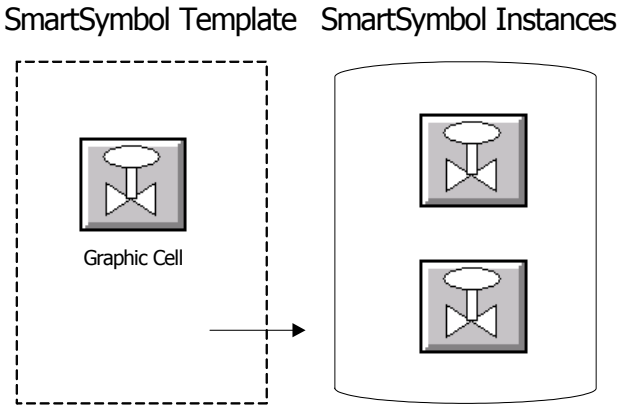
SmartSymbols are Wonderware® InTouch® graphics that are converted into reusable templates. Changes that you make to a SmartSymbol template propagate to all instances of the SmartSymbol throughout the application. This relieves you of the duplicate effort for creating, modifying, validating, and re-validating graphics used repetitively throughout an application.

SmartSymbols can reference InTouch tags and ArchestrA® attributes. A SmartSymbol that references no tags or only InTouch tags is called an InTouch SmartSymbol.

A SmartSymbol that references an attribute of one or more ArchestrA Automation Objects or ArchestrA Automation Object instances is called an ArchestrA SmartSymbol. ArchestrA SmartSymbols may also reference InTouch tags.

InTouch and ArchestrA SmartSymbols are different from ArchestrA Symbols. ArchestrA Symbols are designed and managed using the ArchestrA Integrated Development Environment (IDE).

If you are using InTouch version 10 or later and are creating new graphics, ArchestrA Symbols may be more suitable than SmartSymbols for your application. For more information, see About InTouch HMI and ArchestrA Integration in the *InTouch® HMI and ArchestrA® Integration Guide*.



SmartSymbol Manager and Library

The SmartSymbol library contains the SmartSymbols for an InTouch application. You use the SmartSymbol Manager to import, export, and organize the contents of the SmartSymbol library.

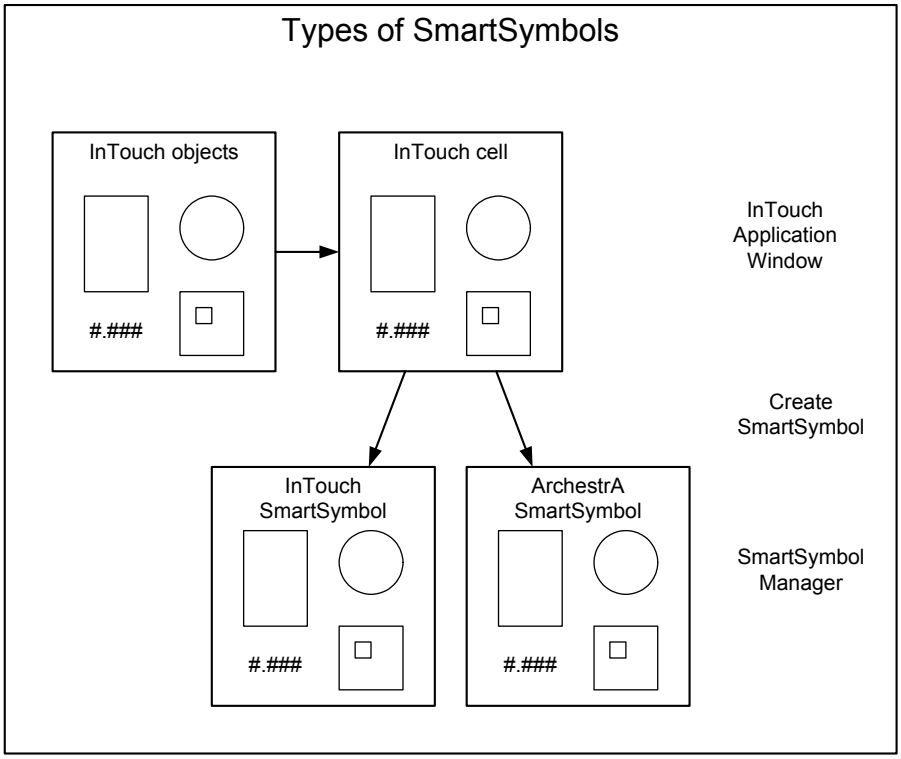
SmartSymbols are stored in a \Symbols folder of the application folder of the user's InTouch application.

Reference information about the SmartSymbols in the library is stored in an XML file. You should not edit the XML file.

InTouch SmartSymbols and ArchestrA SmartSymbols

InTouch SmartSymbols are not the same as ArchestrA SmartSymbols. ArchestrA Symbols supersede ArchestrA SmartSymbols and are developed using the ArchestrA IDE. InTouch SmartSymbols reference InTouch tag data. ArchestrA SmartSymbols reference Galaxy object or template attributes.

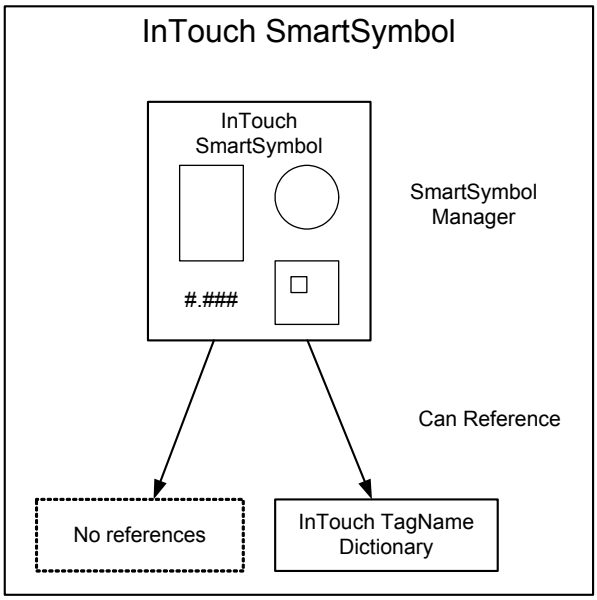
The following figure shows the types of SmartSymbols.



InTouch SmartSymbols

InTouch SmartSymbols are stored under the InTouch Symbols folder in the SmartSymbol Manager.

You can configure animation for the graphical elements in an InTouch SmartSymbol using references to local and remote InTouch tags. For more information, see Creating SmartSymbol Templates and Instances.

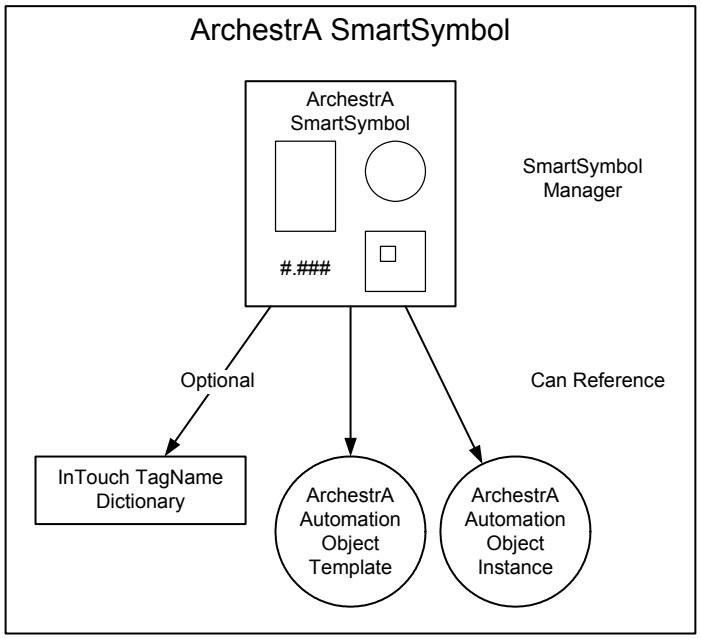


ArchestrA SmartSymbols

ArchestrA SmartSymbols are stored under the ArchestrA Symbols folder in the SmartSymbol Manager.

Note: Even though the folder is labeled ArchestrA Symbols, the folder contains ArchestrA SmartSymbols, not ArchestrA Symbols.

To create ArchestrA SmartSymbols, you select one or more Galaxy object templates to define the animation references for the various graphical elements. For more information, see Creating SmartSymbol Templates and Instances.



Limitations of SmartSymbols

The following are known limitations of SmartSymbols.

- SmartSymbols cannot contain a trend object. If you try to create a SmartSymbol that contains a trend object (historical or real-time), an error message appears.
- SmartSymbols cannot contain Distributed Alarm Display controls, Windows Controls, InTouch ActiveX controls like AlarmViewer, or third party ActiveX controls that are configured in an InTouch application.
- You cannot browse for ArchestrA instances in a galaxy created with Application Server version 1.5. Install Application Server version 2.0 or later to browse for ArchestrA instances.
- Generating SmartSymbols with an SPC Chart wizard is not supported.
- SmartSymbols cannot reference local script variables.
- The **Attribute Browser** does not show derived object instances. To address this issue, create the derived template in the SmartSymbol Manager or create a custom filter in the browser.

Chapter 2

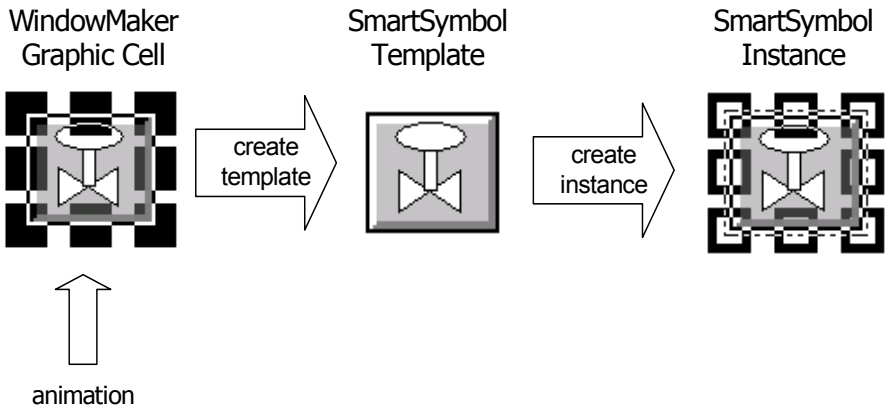
Creating SmartSymbol Templates and Instances

Using WindowMaker, you can create SmartSymbol templates and instances.

You create SmartSymbol templates by drawing one or more graphics in WindowMaker, combining them into a cell, and then converting the cell into a SmartSymbol. You do not have to connect or link templates to InTouch tags or ArchestrA objects.

After you create a SmartSymbol template, you can create an instance of the SmartSymbol in an application window.

You can also create ArchestrA object instances from an existing ArchestrA SmartSymbol instance to avoid switching between InTouch WindowMaker and the ArchestrA Integrated Development Environment (IDE).



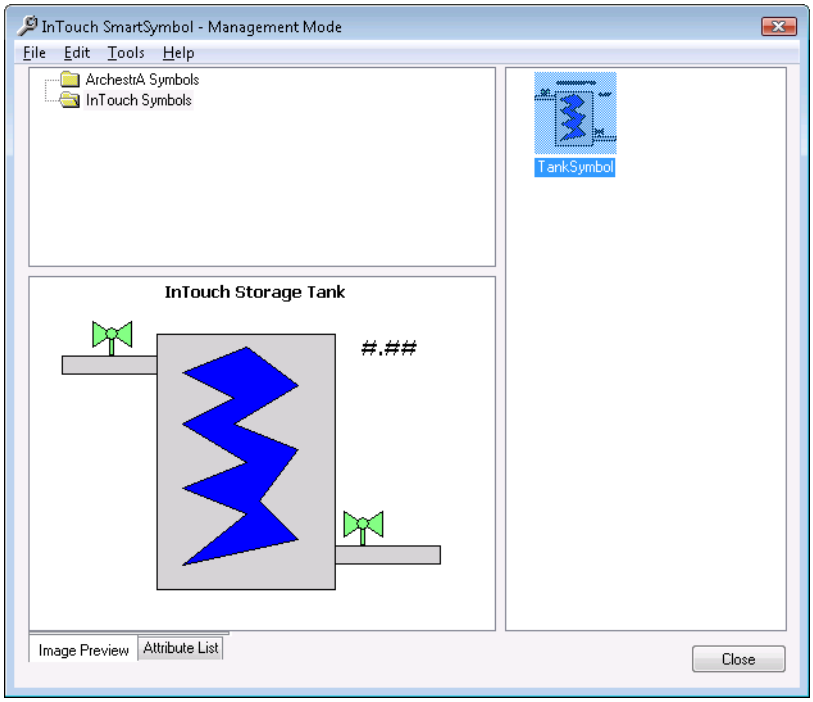
Creating SmartSymbol Templates for Use with InTouch Data

InTouch SmartSymbols are created from cells, which can contain graphical elements, animation, and references to InTouch tags.

The following procedure specifies that a new window, graphics, and cell be created, but you can use an existing window, graphics, or cells to create a SmartSymbol.

To create a new InTouch SmartSymbol template

1. Create a new window in WindowMaker.
2. Using the graphics drawing tools and/or Wizards, create a graphic or set of graphics that you want to include in your SmartSymbol.
3. Configure the animation link(s) for the graphic(s).
   For instructions, see Animating Objects in the *InTouch® HMI Visualization Guide*.
4. Select all objects to be included in the SmartSymbol template.
5. On the **Arrange** menu, click **Make Cell**.
6. Select the cell you just made.
7. On the **Special** menu, point to **SmartSymbol** and click **Generate SmartSymbol**. The InTouch **SmartSymbol - Management Mode** dialog box appears with the new SmartSymbol highlighted.



By default, the new SmartSymbol is placed in the InTouch Symbols top level folder. A default name is automatically assigned to the symbol (for example, New Symbol1).

8 Type a new name or accept the default. You can change the name of the SmartSymbol at any time. For more information on renaming SmartSymbols, see "Renaming SmartSymbol Templates" on page 26.

9 Click **Close**. A message appears prompting you to replace the graphic cell with new SmartSymbol. Click **Yes** or **No**. If you click **Yes**, the graphic cell is replaced by the SmartSymbol. If you click **No**, the graphic cell is unchanged. In either case, the new SmartSymbol is stored in the SmartSymbol library and is available for future use.

Creating ArchestrA SmartSymbol Templates

When you create a SmartSymbol from an InTouch graphic cell that contains at least one reference to an ArchestrA automation object template or instance, you end up with an ArchestrA SmartSymbol.

A reference to an ArchestrA automation template contains a "$" sign.

You can generate SmartSymbol templates that are associated with ArchestrA object templates and/or instances.

When you create a SmartSymbol instance on the InTouch window, you can instantiate its referenced ArchestrA object template.

To generate a new ArchestrA SmartSymbol template

1 Create a new window in WindowMaker.

2 Using the drawing tools and/or Wizards, create graphics that you want to make into a SmartSymbol.

3 Configure the animation link(s) for the graphic(s).

For instructions on configuring Galaxy source names, see Accessing Application Server Data from InTouch in the *InTouch® HMI Data Management Guide* For instructions on configuring creating links to ArchestrA attributes, see Animating Objects in the *InTouch® HMI Visualization Guide*.

4 Select the graphics to make into a cell. On the **Arrange** menu, click **Make Cell**.

5 On the **Special** menu, point to **SmartSymbol**, and click **Generate SmartSymbol**. The SmartSymbol Manager creates the new SmartSymbol for Galaxy data and creates an ArchestrA template folder if one does not already exist.

6 Type in a new name or accept the default name and change it later.

7 Click **Close**. A message appears prompting you to replace the graphic cell with new SmartSymbol. Click **Yes** or **No**. If you click **Yes**, the graphic cell is replaced by the SmartSymbol. If you click **No**, the graphic cell is unchanged. In either case, the new SmartSymbol is stored in the SmartSymbol library and is available for future use.

Creating SmartSymbol Instances from InTouch SmartSymbol Templates

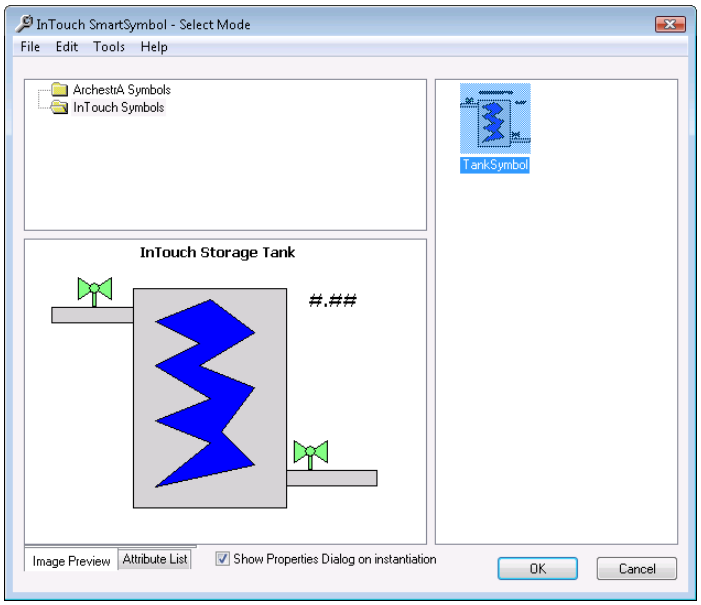
You can create multiple SmartSymbol instances from a single SmartSymbol template. Each instance inherits all references and text labels. Before the instance is placed on the InTouch window, you can change the references and text labels.

To create a SmartSymbol from an InTouch SmartSymbol template

1 Open WindowMaker and open a window where you want to use a SmartSymbol.

2 Click the **SmartSymbol Wizard** icon.

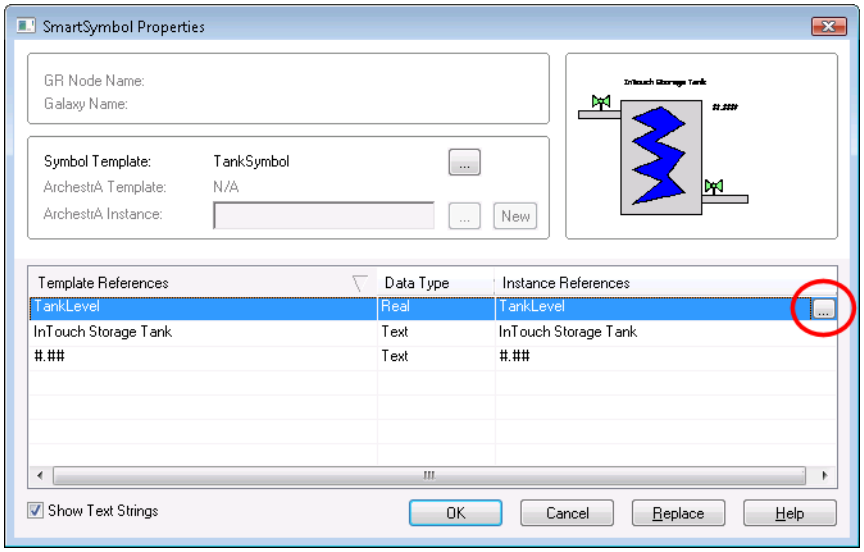
3 Click in the WindowMaker window where you want to place the symbol. The InTouch **SmartSymbol - Select Mode** dialog box appears.



Note: By default, the **Show Properties Dialog on instantiation** check box is selected. Clear the check box if you don't want to change any references or text labels for the new SmartSymbol instance.

4 In the InTouch **Symbols** folder, double-click the SmartSymbol. The new symbol appears in the application window.

If the **Show Properties Dialog on instantiation** check box is selected in the previous step, the **SmartSymbol Properties** dialog box appears.



5 In the **Instance References** column, click the **Ellipsis** button. The **Select Tag** or **Tagname Dictionary** dialog box appears.

6 Select the tag to link to the SmartSymbol. Close the window and the **SmartSymbol Properties** dialog box appears.

Note: If you enter a new tagname that is not defined yet, then the **Tagname Undefined** dialog box appears, click **OK** and define a new tag from the Tagname Dictionary.

7 Click **OK**. The new symbol appears in the application window.

Creating SmartSymbol Instances from ArchestrA SmartSymbol Templates

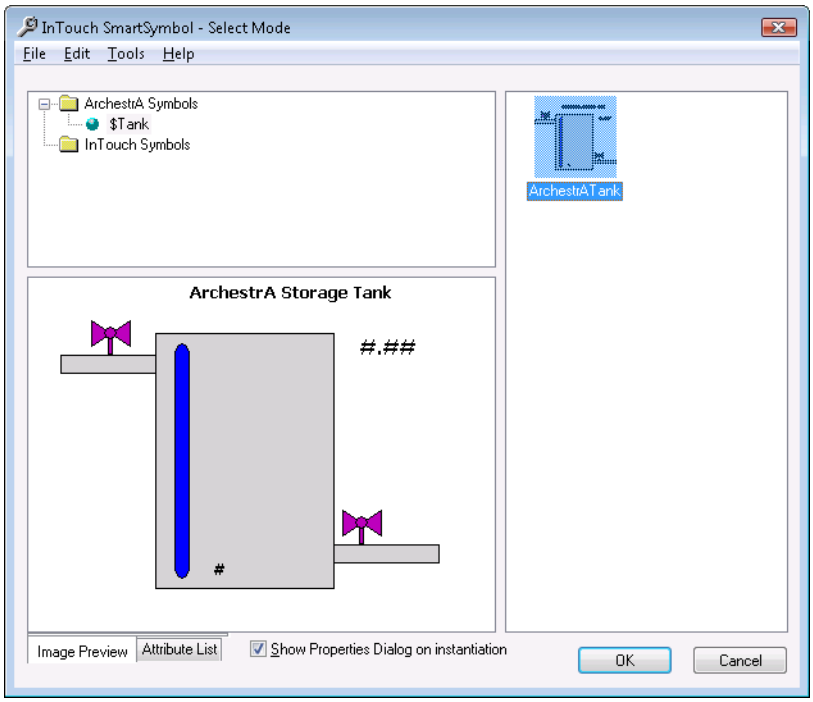
You can create multiple ArchestrA SmartSymbol instances from a single ArchestrA SmartSymbol template.

To create a SmartSymbol from an ArchestrA SmartSymbol template

1 Click **SmartSymbol** icon and click in the WindowMaker window where you want to place the symbol. The InTouch **SmartSymbol - Select Mode** dialog box appears.

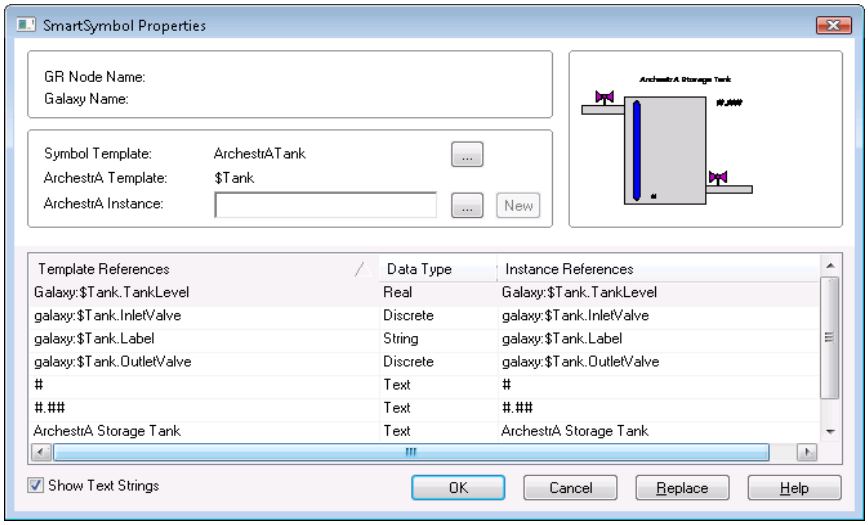
Note: By default, the **Show Properties Dialog on instantiation** check box is selected.

2 Click the ArchestrA Symbols folder. The ArchestrA symbols appear in the right pane.



3 Select the SmartSymbol and click **OK**. The new symbol appears in the application window.

If the **Show Properties Dialog on instantiation** check box is selected in the previous step, the **SmartSymbol Properties** dialog box appears.



4 In the **ArchestrA Instance** text box, you can either:

- Browse for and select an ArchestrA object.
- Create a new ArchestrA object instance derived from associated object template. Enter a name for the instance and click **New**.

The instance attribute references appear in the **Instance References** column.

Note: If you did not connect the Galaxy yet, a dialog box appears prompting you to enter node name and Galaxy name.

5 In the **Instance References** column, change the references if needed. You can manually type in the references with correct syntax or click the **Ellipsis** button to use the **Attribute Browser**.

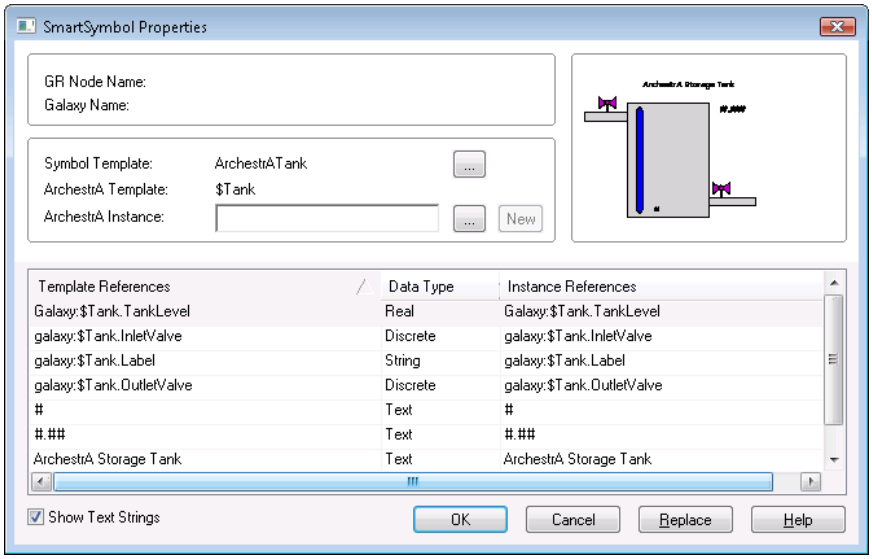
6 Click **OK**. The new symbol appears in the HMI window.

Creating an ArchestrA Object Instance from an ArchestrA SmartSymbol Instance

You can create a new ArchestrA object instance from an existing ArchestrA SmartSymbol instance. By doing this, you do not need to switch between WindowMaker and the IDE.

To create a new ArchestrA object instance

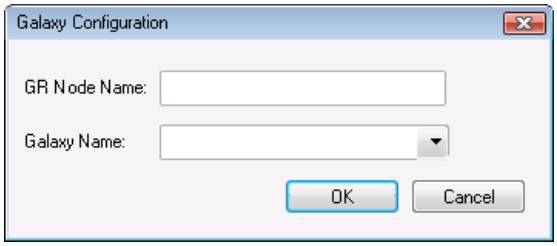
1. In WindowMaker, open the window in which the SmartSymbol instance is located.
2. Double-click the SmartSymbol instance in the application window. The **SmartSymbol Properties** dialog box appears.



3. In the **ArchestrA Instance** box, type a valid name for the new Automation object.

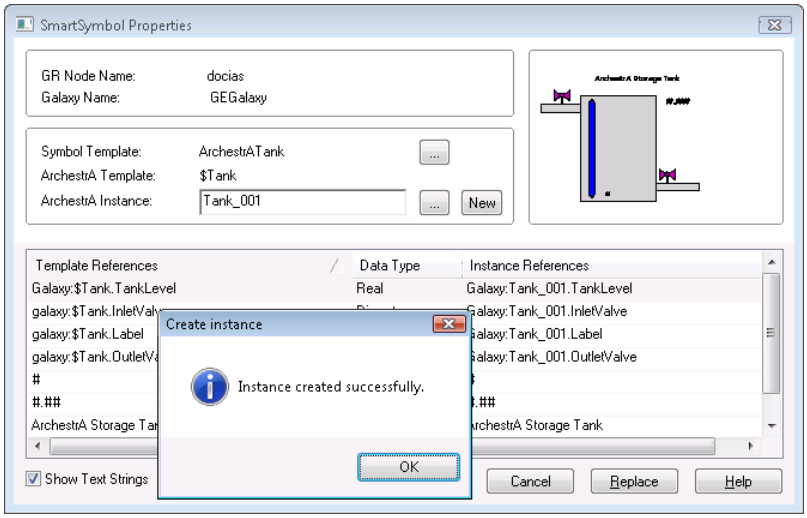
Note: If this is the first time you specify an object, you are prompted to log in. Provide a valid user name, password, and domain name. If the Application Server security is set to a mode other than None, a domain name is required only for OS User or OS Group Based security.

4. Click **New**. When the message appears prompting you to select a valid Galaxy in which to create the new object, click **OK**. The **Galaxy Configuration** dialog box appears.



5. Specify the Galaxy. Do the following:
   a. In the **GR Node Name** box, type the name of the computer that the Galaxy is running on.
   b. In the **Galaxy Name** list, click the Galaxy.

c Click **OK**. The ArchestrA object instance is created and the instance references point to the new instance.



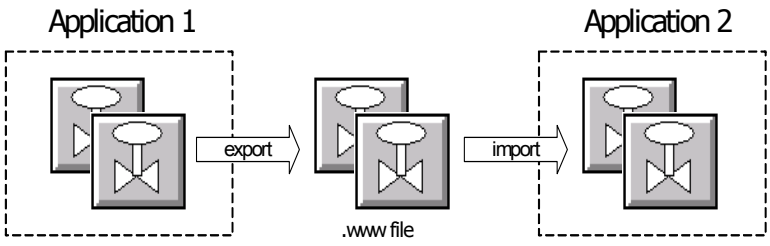
d Click **OK** again to close the **Create Instance** dialog box.

6 Click **OK** to close the **SmartSymbol Properties** dialog box. The new SmartSymbol instance appears in the application window.

Chapter 3

Managing SmartSymbols

Using the SmartSymbol Manager, you can import and export SmartSymbols among multiple InTouch applications and across different physical systems. Exporting and importing SmartSymbols is the best way to move SmartSymbols between InTouch applications.



You can also import windows with SmartSymbols and the graphics will be imported—but not the template information—resulting in orphaned instances of SmartSymbols. For more information, see "Recovering SmartSymbols" on page 30.

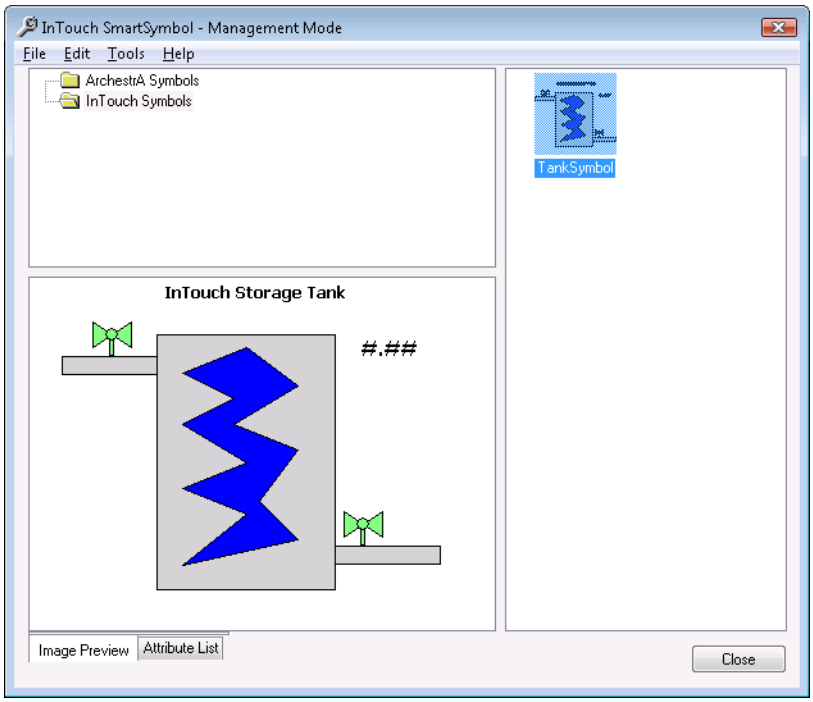
With the SmartSymbol Manager, you can rename, duplicate, delete, and save SmartSymbol templates.

Importing SmartSymbols

You can import SmartSymbols from other InTouch applications into your application's SmartSymbol library. Importing symbols from other applications allows you to reuse symbols instead of creating those symbols again.

To import SmartSymbols into the SmartSymbol library

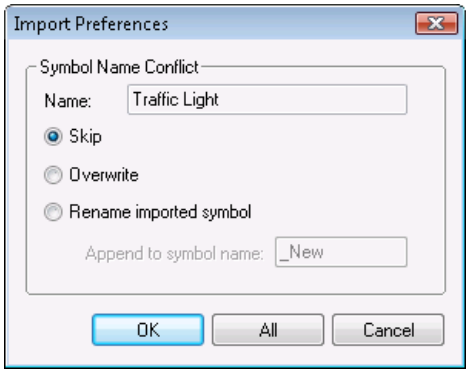
1. Close all application windows.
2. On the **Special** menu, point to **SmartSymbol**, and click **Manage SmartSymbol**. The InTouch **SmartSymbol - Management Mode** window appears.



3. On the **File** menu, click **Import**. The **Import Symbol** dialog box appears.
4. Browse for the file that contains the SmartSymbols to import. Symbol export files have a .www file extension.

5 Select the file, and click **OK**. The SmartSymbols in that file appear in the SmartSymbol Management Mode window.

If there is a name conflict, the **Import Preferences** dialog box appears.



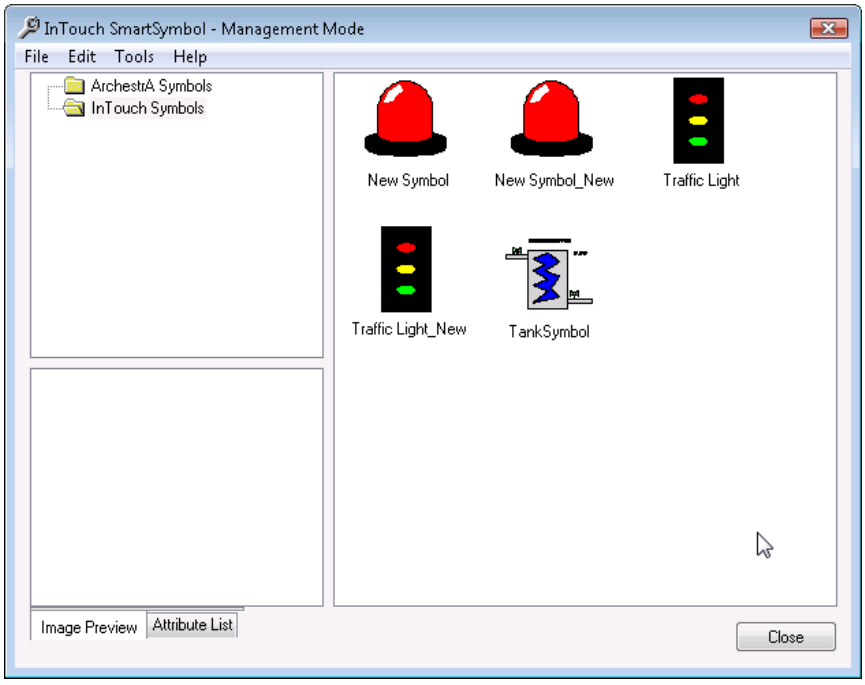
6 Do one or more of the following:

- To skip the import of this symbol, click **Skip**. If you are importing multiple symbols, the rest of the symbols are imported.
- To overwrite the existing symbol with the new one, click **Overwrite**.
- To rename the new symbol with an unused name, click **Rename imported symbol**. In the **Append to symbol name** box, type the name.

7 Do one of the following:

- Click **OK** to apply the selected option to the SmartSymbol.
- If you clicked **Rename imported symbol**, click **All** to apply the text in the **Append to symbol name** box to all SmartSymbols with name conflicts in the package file.

The imported SmartSymbol(s) appear in the InTouch **SmartSymbol Management Mode** window.

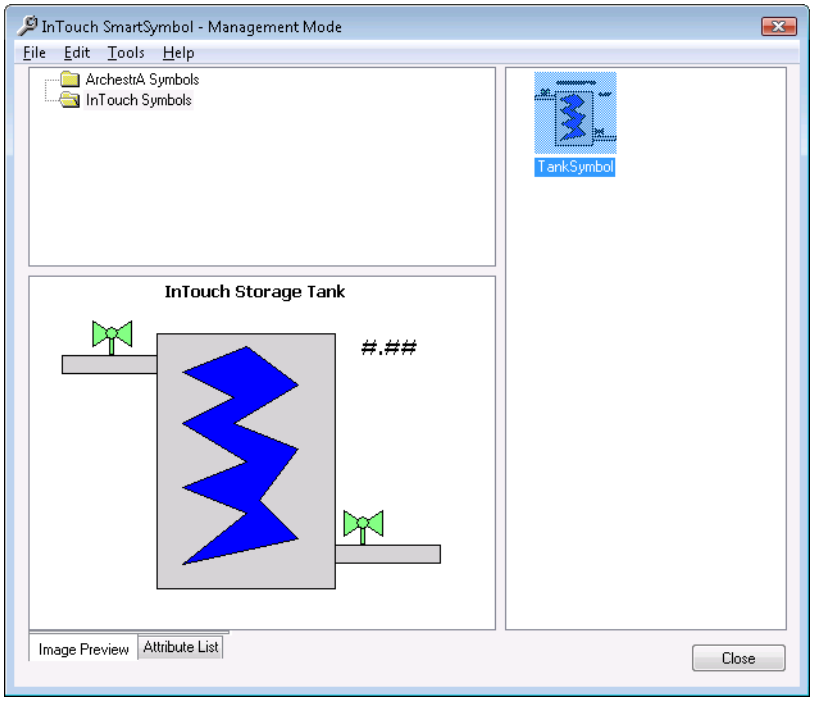


Exporting SmartSymbols

After you create or import SmartSymbols in your application SmartSymbol library, you can export one or more SmartSymbol templates to other InTouch applications. Exporting SmartSymbol templates is the recommended way to move SmartSymbols between InTouch applications.

To export a SmartSymbol

1 On the **Special** menu, point to **SmartSymbol**, and click **Manage SmartSymbol**. The InTouch **SmartSymbol - Management Mode** window appears.



2 From the list of SmartSymbols and folders, select the SmartSymbol(s) or folder(s) that you want to export.

3 On the **File** menu, click **Export**. The **Export Symbol** dialog box appears.

4 Browse to the folder to export the symbol to.

5 Type in a file name, with a .www extension, and click **Save**. The SmartSymbol(s) and/or folder(s) is(are) exported to the folder you specified.

Renaming SmartSymbol Templates

Using the SmartSymbol Manager, you can rename SmartSymbol templates. Renaming a SmartSymbol template has no impact on any SmartSymbol instances.

To rename a SmartSymbol template

1. In the SmartSymbol Manager, select the SmartSymbol template you want to rename.
2. On the **Edit** menu, click **Rename**.
3. Type in a new name for the symbol and then press **Enter**. The SmartSymbol template appears with the new name.

Duplicating SmartSymbol Templates

After you create a SmartSymbol template, you can create a copy of it. For example, you can duplicate a template and modify and edit it to be a new template with similar features.

For more information on editing SmartSymbol templates, see Editing SmartSymbols.

To duplicate a SmartSymbol template

1. In the SmartSymbol Manager, click the SmartSymbol that you want to duplicate.
2. On the **Edit** menu, click **Copy**.
3. Click the folder for the new SmartSymbol.
4. On the **Edit** menu, click **Paste**. The new SmartSymbol appears. If placed in the same folder as the original, the new SmartSymbol is named Copy of <original name>.

Deleting SmartSymbol Templates

If you delete a SmartSymbol template, you can no longer open, edit, or view the properties of SmartSymbol instances based on the template. The run time state of those SmartSymbol instances is not affected by the deletion.

You can recover a deleted SmartSymbol from its instance. For more information, see "Recovering SmartSymbols" on page 30.

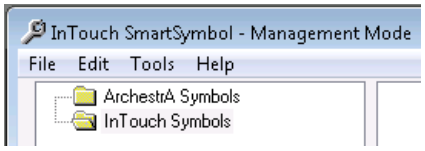
To delete a SmartSymbol template

1. In the SmartSymbol Manager, select the SmartSymbol to delete.
2. On the **File** menu, click **Delete**. When the message appears, click **Yes**. The SmartSymbol template is deleted from the SmartSymbol library. All instances of this SmartSymbol become orphaned.

Saving SmartSymbols in a Folder Hierarchy

SmartSymbols are stored in the SmartSymbol library in a standard hierarchical folder structure. You can see two standard folders are included to simplify the organization of SmartSymbols in the SmartSymbol library:

- A top-level folder for ArchestrA SmartSymbol templates
- A top-level folder for InTouch SmartSymbol templates



You can create sub-folders for templates using the SmartSymbol Manager. Store ArchestrA SmartSymbol templates in the template folder with which they should be associated with when they are created. For example, if you create a SmartSymbol to use with $Valve objects, store the symbol template in the "$Valve" template folder.

You cannot drag ArchestrA SmartSymbols into an InTouch Symbols folder, and you cannot drag InTouch SmartSymbols into an ArchestrA Symbols folder.

To move a SmartSymbol to a different folder

1. Select the SmartSymbol you want to move.
2. Drag the SmartSymbol into the new folder.

Support for SmartSymbols and Language Switching

Language switching works for SmartSymbols if the SmartSymbol template exists in the application.

If a SmartSymbol contains translatable text objects, when you export the dictionary a separate XML is generated, for example SSD_<SymbolName>_<LangID>_<ID>.xml. This XML file contains all translatable strings contained in the SmartSymbol. You can open it in Excel and translate the text strings like you would for any InTouch application.

When you import the translation for an InTouch application, the translations for each SmartSymbol are imported as well.

When you switch languages in WindowViewer, any SmartSymbols containing translatable strings that are translated in this way appear translated.

When exporting SmartSymbols that have dictionary files, the dictionary files are exported along with the .www file. For more information about language switching, see Switching a Language at Run Time in the *InTouch® HMI Application Management and Extension Guide*.

Recovering SmartSymbols

When you delete a SmartSymbol template from the library, all instances of that SmartSymbol are considered “orphaned” instances. You can recover a deleted SmartSymbol from an orphaned instance. If an orphaned instance does not exist in an application window, you cannot recover the SmartSymbol.

If you try to open the properties of an instance after the SmartSymbol template is deleted, a warning message appears telling you that the SmartSymbol no longer exists in the library.

You can also have orphaned instances if you import a window containing SmartSymbols. You must recover the SmartSymbol from the orphaned instance and then rename the SmartSymbol.

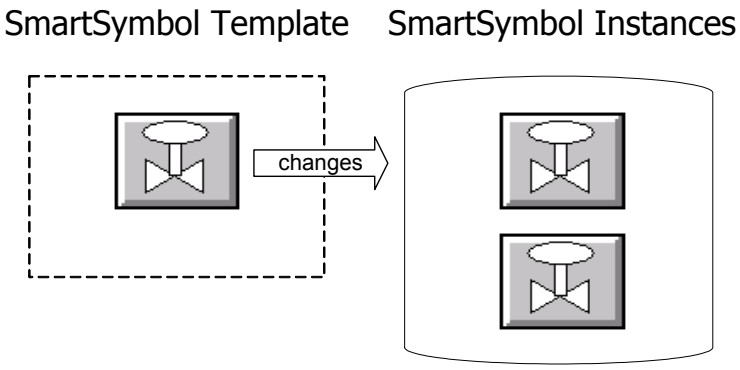
To recover a deleted SmartSymbol

1. Click an orphaned instance of the deleted SmartSymbol in an InTouch HMI application window.
2. On the **Special** menu, point to **SmartSymbol** and click **Recover SmartSymbol**. The SmartSymbol appears in the **SmartSymbol Management Mode** window, with a name of **New Symbol**.
3. Rename the SmartSymbol as appropriate.

Chapter 4

Editing SmartSymbols

After you create a SmartSymbol, you can edit it by changing and modifying the template or an instance of the SmartSymbol.



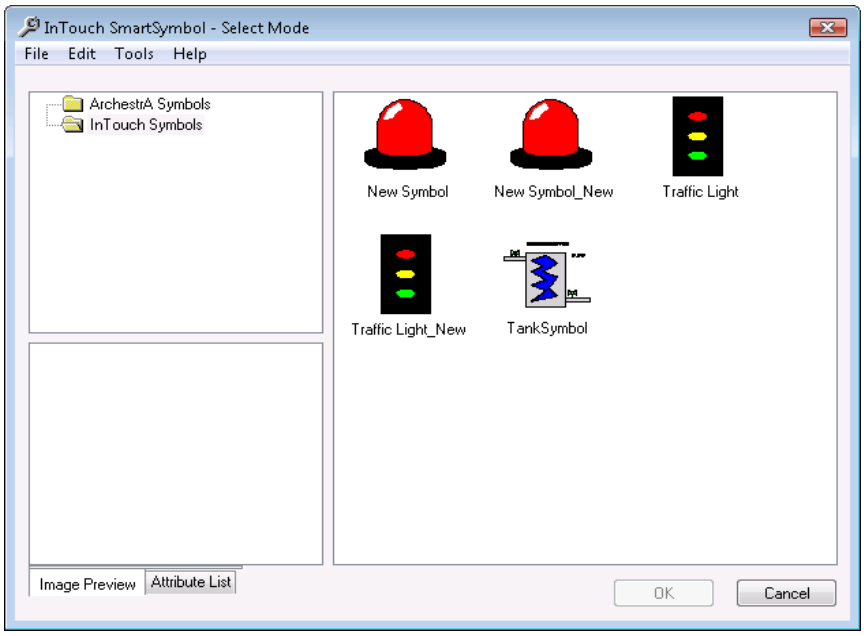
Changing SmartSymbol Templates

To edit a SmartSymbol, break the cell and then use the drawing tools to make changes. You can also change the animation that is associated with the SmartSymbol. Template changes affect all instances of the SmartSymbol.

Note: Edit SmartSymbols in a temporary window rather than in an application window.

To edit an existing SmartSymbol template

1. On the **Special** menu, point to **SmartSymbol** and click **Start SmartSymbol Edit**.
2. Click in the window where you will edit the SmartSymbol. The InTouch **SmartSymbol - Select Mode** window appears.

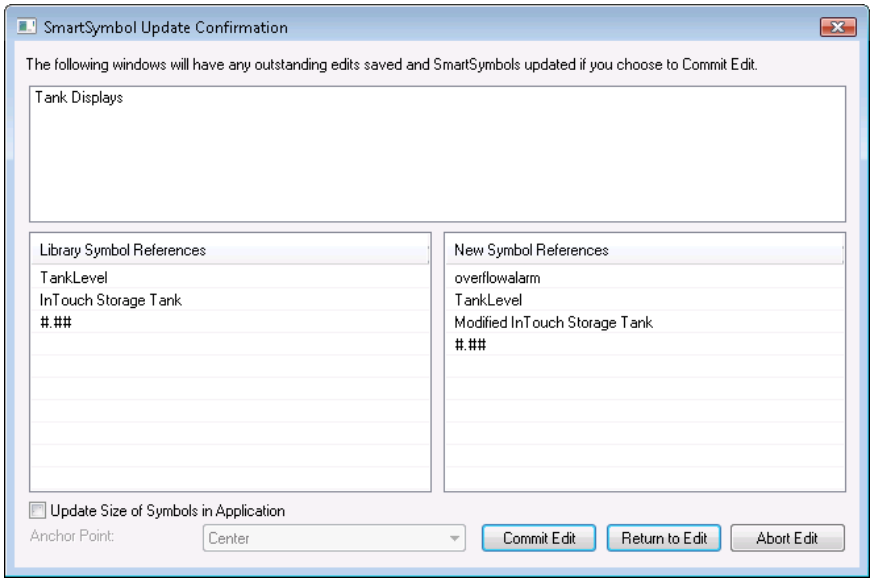


3. Select a SmartSymbol to edit and click **OK**. An instance of the SmartSymbol is placed in the application window.
4. On the **Arrange** menu, click **Break Cell**. The symbol is broken into its component elements.
5. You can now edit one or more elements.

Note: If you add elements to a cell that is part of a SmartSymbol, this can result in a spatially larger cell. When you propagate the changes to the SmartSymbol instances, you can select whether or not to propagate the size change.

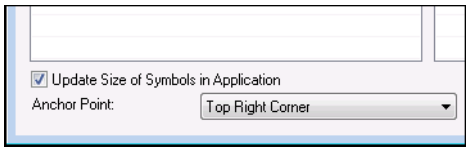
6. When you are done editing, select all elements of the symbol. On the **Arrange** menu, click **Make Cell**.

7 On the **Special** menu, click **SmartSymbol**, and then click **End Symbol Edit**. The **SmartSymbol Update Confirmation** dialog box appears.



8 If the size of the edited SmartSymbol changed, you can configure the size propagation. Do one of the following:

- To not affect the size of existing SmartSymbol instances, clear the **Update Size of Symbols in Application** check box.
- To propagate the change in the size of the template to the SmartSymbol instances, select the **Update Size of Symbols in Application** check box, and in the **Anchor Point** list, click which part of a SmartSymbol instance is to be "anchored" to the screen when the resizing is done.



9 Do one of the following:

- To apply the changes you made, click **Commit Edit**. The SmartSymbol Manager updates the SmartSymbol template and all instances.
- To continue editing the SmartSymbol, click **Return to Edit**. The application window reappears for further editing.

Changing SmartSymbol Instances

You can change any references and static text in a SmartSymbol instance. You can search and replace the static text in the instance.

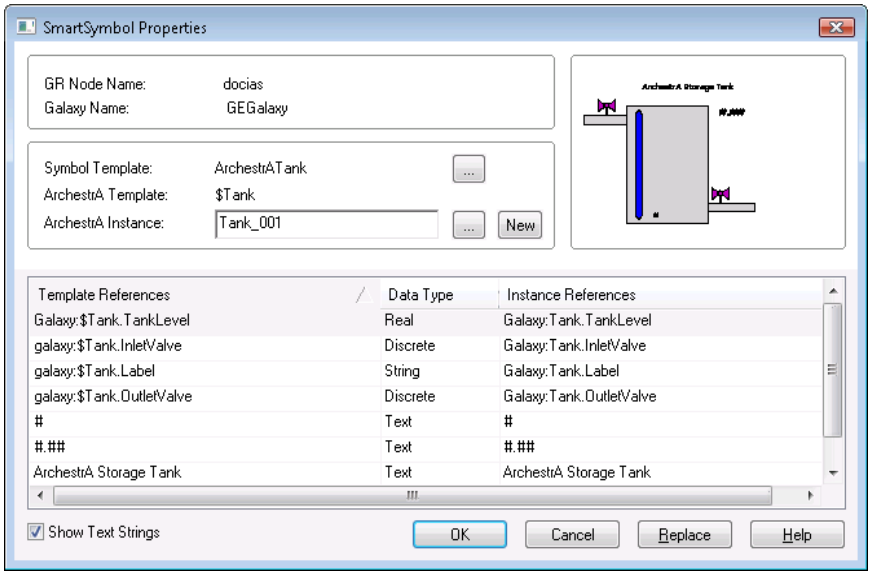
Selecting a Different Reference for a SmartSymbol Instance

After you place a SmartSymbol in a window as an instance, you can change its references to point to something different, such as another object or a different tag. The SmartSymbol template is not affected.

At run time, you can change the tags a SmartSymbol instance references by using the IOSetRemoteReferences() script function. For more information, see Redirecting Remote References During Run Time *in the InTouch® HMI Data Management Guide*.

To edit references in a SmartSymbol instance

1 Double-click the SmartSymbol instance. The **SmartSymbol Properties** window appears.



2 Do any of the following:

- Click the **Ellipsis** button next to **Symbol Template** to select a new SmartSymbol template.
- Click the **Ellipsis** button next to the **ArchestrA Instance** text box to browse for an ArchestrA object instance.

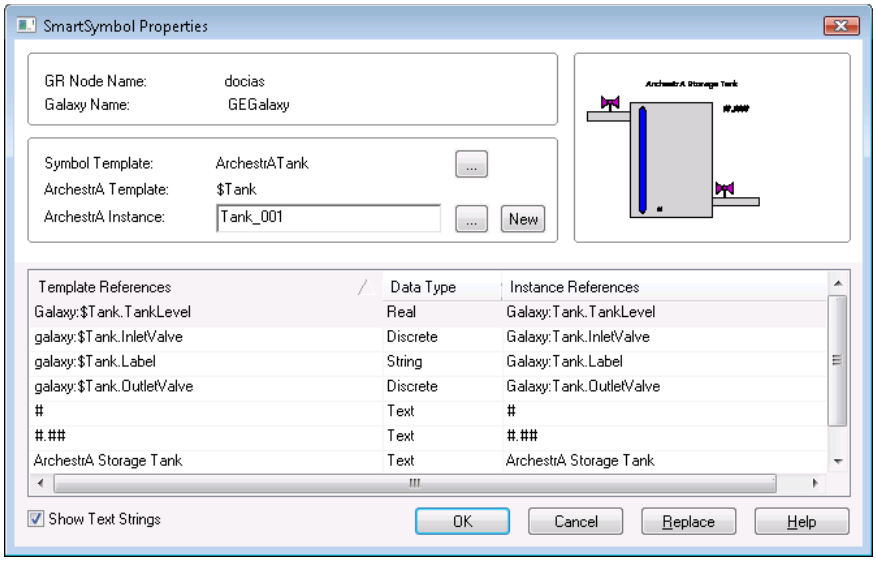
3 Select a different object instance to map to the SmartSymbol and click **OK**.

Manually Editing Text and References of a SmartSymbol Instance

After you create a SmartSymbol instance in an application window, you can change the static text in the instance.

To change the static text in a SmartSymbol instance

1 Double-click the SmartSymbol instance. The **SmartSymbol Properties** window appears.



2 In the **Instance References** column, click in the text box and modify the text.

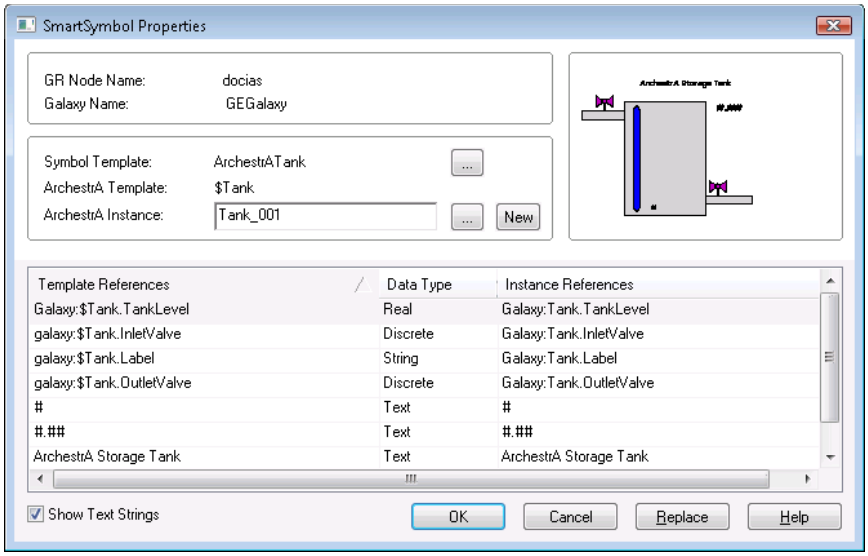
3 Click **OK**.

Replacing SmartSymbol Instance Tagnames and Text Strings

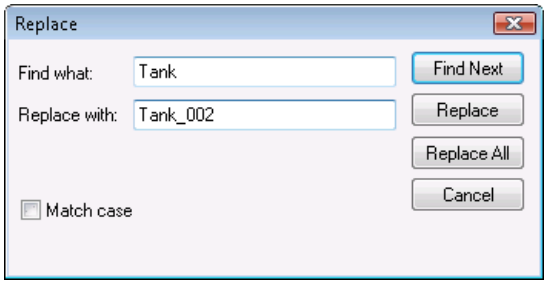
If several references and text strings of a SmartSymbol instance require the same change, you can use the replace feature.

To replace SmartSymbol instance references

1 Double-click the SmartSymbol instance. The **SmartSymbol Properties** window appears.



2 Click **Replace**. The **Replace** dialog box appears.



3 Configure the replacement text strings. Do the following:

a In the **Find what** box, type the text you want to replace. Select the **Match case** check box make the search case-sensitive.

b In the **Replace with** box, type the replacement text. The replacement text is always used exactly as typed.

4 Do one of the following:

- To replace all text, click **Replace All**.
- To find and replace the text one instance at a time, click **Find Next** and click **Replace** to replace that one instance.

5 Click **OK**. The SmartSymbol instance in the application window appears with the changed tags and text strings.

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