

Instrument Toolkit®

Instructional Manual



ROSEMOUNT


EMERSON
Process Management

INSTALLATION

The following instructions will walk you through installing Instrument Toolkit. First, you will need to install the “Full Install” version of Instrument Toolkit.

Full Installation

1. Run the Toolkit setup executable file from the Toolkit CD.
2. Click the **NEXT** button on the Welcome screen.
3. Read the license agreement on the License agreement screen. Click the **YES** button to accept the agreement and continue with the installation.
4. Read the product information on the Product information screen. Click the **NEXT** button to continue with the installation.
5. If you wish to change the location of your Toolkit installation, click the **BROWSE** button on the Installation destination window and choose your preferred installation location from the browse window that appears. After you have your installation location selected, click on the **NEXT** button to continue the Installation.
6. In the Choose World Area window, highlight the radio button of the World Area in which you are located.
 - NASA = North America/South America
 - EMEA = Europe/Middle East/Africa
 - AP = Asia Pacific
 - China = ChinaClick the **NEXT** button to continue installation.
7. Click the **FINISH** button on the Finish Installation screen to finish the Installation.

Toolkit Build Updates

Build updates are available every 3 months and database updates are available every month. It is important to keep Instrument Toolkit updated to get the latest Rosemount product availability and new Toolkit functionality.

Build Updates – There are two easy ways to update to the latest Toolkit Build. (Automatic or Web). Automatic Updates (Recommended) – You will be prompted to automatically update Instrument Toolkit when there is a new patch update available (approximately every 3 months). Automatic Updates can only be run when the user has a connection to the Internet.

1. When you launch Instrument Toolkit, an Automatic Update window will pop-up before you go into the software. Click on the **YES** button to begin the file download
2. Once the file is downloaded, click on the **START SETUP** button to begin the installation.
3. On the Welcome Screen, click the **NEXT** button to begin the installation.
4. Click on the **FINISH** button on the complete screen to finish the Installation. A restart of your computer may be required.

-OR-

Web Installation – If you are unable to run Automatic Updates, you can download the latest Toolkit build from the Web. Before you run updates from the Web, go into the Toolkit Help menu and select About Instrument Toolkit to make sure that you did not already update your version of Toolkit through Automatic Updates (the latest version will be displayed on the Toolkit web site). Toolkit Updates can be found at: <http://www2.emersonprocess.com/en-US/brands/rosemount/Accessories/Toolkit/Pages/index.aspx>

1. Click on the Availability tab. The Toolkit update file can be downloaded from the Download Build “XXX” link. When the Microsoft security warning comes up, click on the RUN button. A download progress screen will appear.

2. A download progress screen will appear. Once the file is downloaded, the Toolkit installation wizard will begin.
3. On the Welcome screen, click the **NEXT** button to begin the installation.
4. Click on the **FINISH** button on the complete screen to finish the Installation. A restart of your computer may be required.

Toolkit Database Updates

Automatic Updates – You will be prompted to automatically update Instrument Toolkit when there is a new database update available (approximately once per month). Automatic Updates can only be run when the user has a connection to the Internet.

1. When you launch Instrument Toolkit, an Automatic Update window will pop-up before you go into the software. Click on the Yes button to begin the file download.
2. Once the file is downloaded, click on the **START SETUP** button to begin the installation.
3. On the Welcome Screen, click the **NEXT** button to begin the installation.
4. A standalone Database update window will pop-up. Click on the **START UPDATE** button to continue the installation.
5. Click on the **FINISH** button on the complete screen to finish the Installation.

Registration

After you have Instrument Toolkit installed, a registration screen will appear the first time you launch the Toolkit software. Please complete the registration form and **leave the Registration Number field empty** (the software will automatically assign you a registration number). After you have the form completed, click on the **SUBMIT REGISTRATION** button to begin using Instrument Toolkit.

GETTING STARTED

The information below will get you started with basic Toolkit user information that will help you create, organize, print and share Toolkit data. The following items are located in the **< FILE >** menu.

New Project*

1. Enter your project name in the **< PROJECT NAME >** field, (required).
2. Select the appropriate **< WORLD AREA >** (i.e. NASA = North America/South America) from the World Area combo box, (required).
3. The **< CUSTOMER, CONTRACTOR, DESTINATION, SITE NAME, QUOTE NAME, CURRENCY, FACTOR, SYMBOL, and PROJECT DESCRIPTION >** fields can be filled in to add detail to the project, (not required).

New Area*

This functionality is used to differentiate a new or different area inside a plant. Adding a new area creates a new section of tags labeled by the Area Number.

1. Enter in the **< AREA NUMBER >** (this is what the area will be named in Toolkit – Does not have to be a number).
2. The **< CUSTOMER, CONTRACTOR, SITE NAME, and AREA DESCRIPTION >** fields can be filled in to add detail to the new area.

New Tag

An instrument, sensor, or transmitter in Toolkit is called a Tag. A tag is data in Toolkit that represents a physical tag on Rosemount or Micro Motion products.

1. Highlight the radio button for the type of Rosemount or Micro Motion product that you want to configure.
2. Double-click the device type from the list below.

*Field names in **Red** are required. Field names in **Blue** are not required.

EXPORT / IMPORT FUNCTIONALITY

Toolkit allows you to generate a file that can be easily transferred by e-mail. There are 2 types of files Toolkit can create.

1. Toolkit file (.tlk file).
 - Used to import / export from Toolkit to Toolkit.
 - Import does not require you to rebuild the model number.
2. Comma Separated Variable file (.csv file)
 - Used to import / export from Toolkit to Toolkit.
 - Import does not require you to rebuild the model number.

There are 2 ways that you can save information in Toolkit form. (*.tlk file).

1. Export Tag Information Only
 - Saves individual tags based on tag type (i.e. Pressure, Temperature, Vortex) to a file.
2. Export Complete Project
 - Saves all tags from a project to one file.

Export Tag

1. Choose your tag type (product type) from the Tag Type combo box to bring up your saved tags.
2. Highlight the tag that you want to export in the Select Tags to Export box.
3. Click on the **BROWSE** button next to the <SAVE AS FILENAME> field to choose the location to export the tag to.
4. Click on the **EXPORT** button.

Export Entire Project

1. Choose the location that you want to save the file.
2. Name the file in the File <NAME> field, this will save the entire project as a file.

Import

1. Click on the **BROWSE** button next to the Filename field and browse to the .tlk file that you want to import.
2. Click on the **IMPORT** button.

MISCELLANEOUS

Report Rollup

This functionality “Rolls Up” multiple reports to an Excel file allowing you to compare reports from multiple tags at one time.

1. Highlight the tag that you want to run a report on. Click **NEXT**
 - Click **SELECT ALL TAGS** button to highlight all available tags.
2. Check the box next to the report(s) that you wish to run.
3. Choose a location to save the reports (click on the **BROWSE** button and select a location).
4. Click on the **BEGIN** button and the reports will be saved to the specified location.

Print Tags

1. Choose the Tag Type (i.e. DP Flow Transmitters) from the combo box.
2. Check the box or boxes of the report type(s) that you wish to print.
3. Highlight the tag(s) you wish to print in the Select Tags to Print box
 - Check the Select All Tags box to select all available tags.
4. Click on the **PRINT** button – This will send the reports directly to your default printer.

PREFERENCES

Unit Preferences

Use the Unit Preferences window to set your Toolkit preferences for units of measure.

1. Select your preferred units of measure from the drop-down boxes in the window. The selected units will be your default units when you open a new tag.
2. Use the radio buttons to change unit selection options to US Units, Metric Units, or both.
3. When the Unit Conversions check box is checked, process information will automatically convert when you change units of measure. If the Unit Conversions check box is not checked, process conditions will not automatically convert when you change your units of measure.

Decimal Points

Use the decimal points window to set your Toolkit preferences for the number of characters you want after the decimal point. This will affect the values on the results screens, not the values on reports.

1. Choose the number of characters you want for each item (Flow rate, Temperature, Viscosity, Distance, etc...) from the combo boxes on the window.
2. Click the **OK** button to save those preferences.

MINIMUM SYSTEM REQUIREMENTS

- Windows XP or Windows 7 operating system
- Microsoft Excel 2000, 2003, or 2007
- 512MB of RAM
- 2GB of open hard drive space
- NOTE: Internet Connection is not required, but suggested for receiving automatic updates

For more information about Instrument Toolkit, please visit:

<http://www2.emersonprocess.com/en-US/brands/rosemount/Accessories/Toolkit/Pages/index.aspx>