



 **Intelligent Plant**[™]
Inform, Enhance, Grow. Intelligently.



First Time User Access to Gestalt PnID[™] & Gestalt Trend[™]

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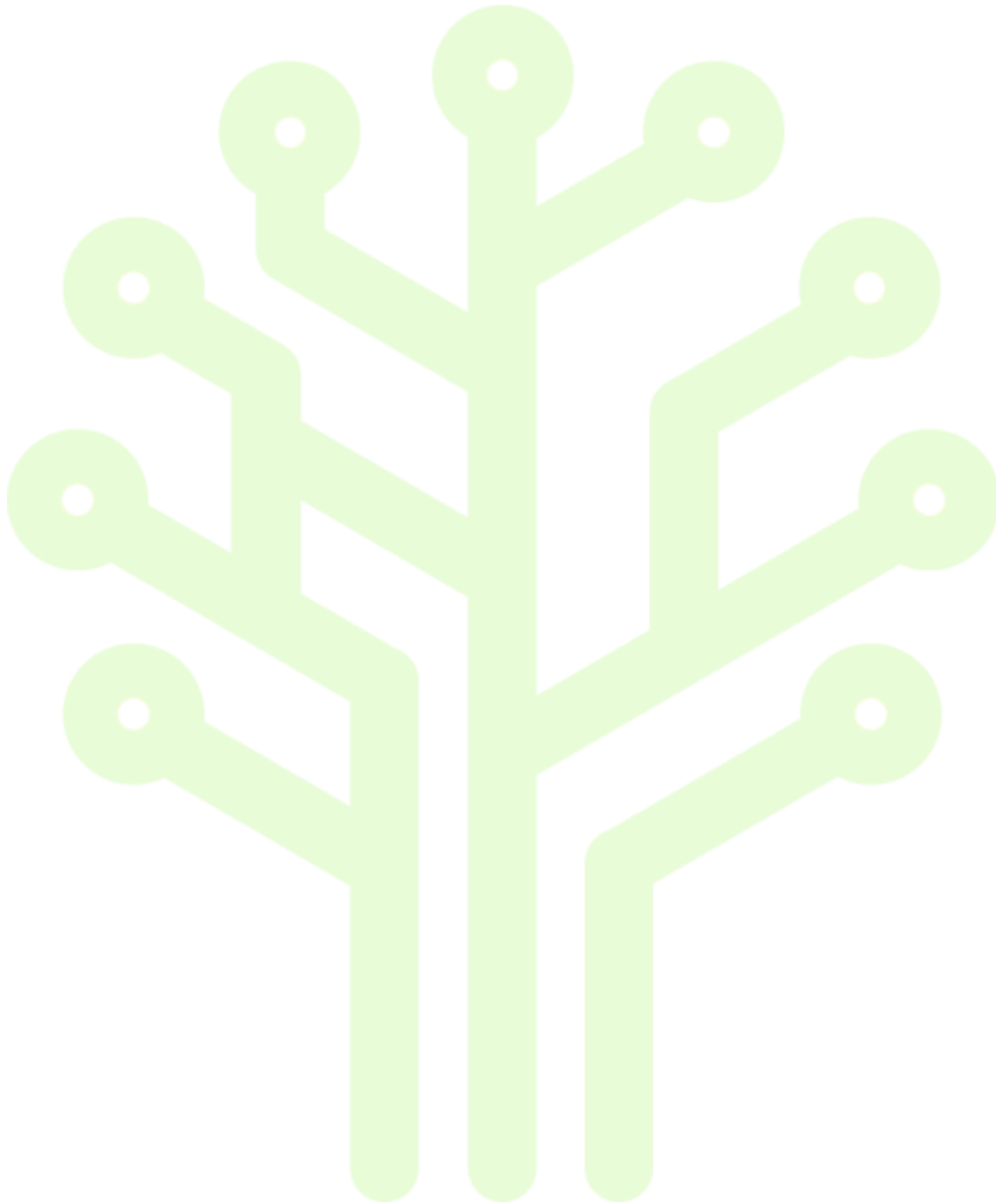
Table of Contents

1	Purpose of Document.....	7
2	Access to the Industrial App Store	8
3	Authorize Apps to Connect to Datasources	9
3.1	First Log In	9
3.2	Subsequent Log Ins	10
4	Getting Started in Gestalt PnID	12
4.1	Personal Dashboards & Group Dashboards	14
4.2	Accepting a Share within Gestalt PnID	16
4.3	Time Controls	17
4.3.1	<i>Real Time</i>	17
4.3.2	<i>Historical Time</i>	17
5	Gestalt PnID	20
5.1	Creating a New Folder	20
5.2	Edit Mode	20
5.3	Viewing a Dashboard	22
6	Getting Started in Gestalt Trend	25
6.1	Personal Dashboards & Group Dashboards	27
6.2	Accepting a Share within Gestalt Trend	29
6.3	Time Controls	31
6.3.1	<i>Play Menu</i>	31
6.3.2	<i>Time Menu</i>	31
7	Gestalt Trend	33
7.1	Creating a New Folder	33
7.2	Viewing a Dashboard	34

Figures

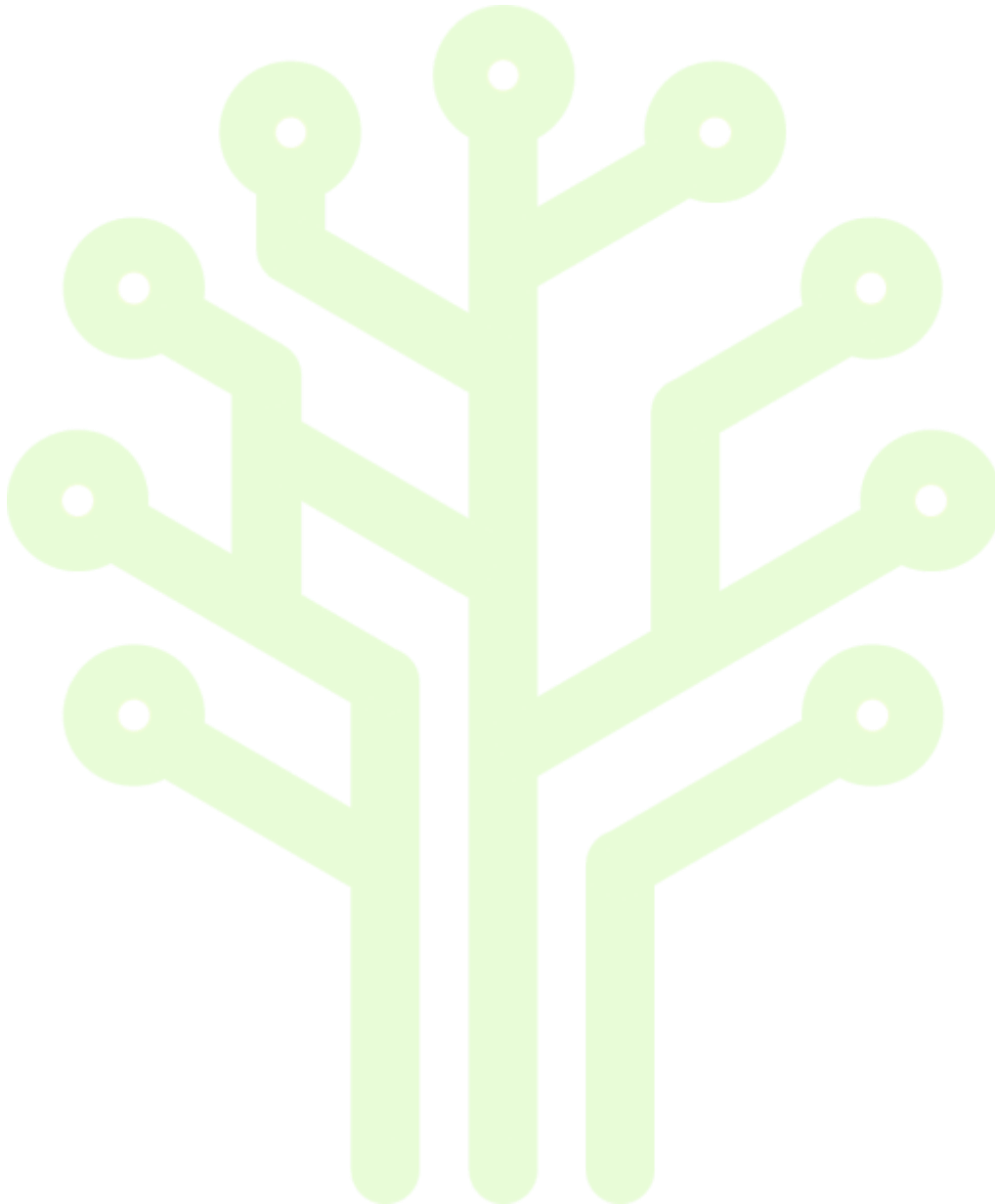
Figure 2-1 Access the Industrial App Store	8
Figure 2-2 Industrial App Store Home Page	8
Figure 3-1 Application Authorization	9
Figure 3-2 Select Datasources	9
Figure 3-3 Home page – My Account	10
Figure 3-4 My Account – Authorized Applications	10
Figure 3-5 Authorize Applications in Your Account	11
Figure 3-6 Select your Datasource	11
Figure 3-7 Datasource Selected	11
Figure 4-1 Industrial App Store Home Page	12
Figure 4-2 Gestalt PnID Card	12
Figure 4-3 Demo pages in Gestalt PnID	12
Figure 4-4 Select Icon – Access to Left Side Panel	13
Figure 4-5 Left Side Panel Options - Dashboards	13
Figure 4-6 Dashboard Options	14
Figure 4-7 Personal Dashboards & Group Dashboards	14
Figure 4-8 Personal Dashboards – Folders and Dashboards	15
Figure 4-9 Sharing a Dashboard or Folder	15
Figure 4-10 Setting Up a User Share	15
Figure 4-11 New Share Available in Personal Dashboards	16
Figure 4-12 Share Accepted in Personal Dashboards	16
Figure 4-13 Time Controls	17
Figure 4-14 Time Controls – Real Time	17
Figure 4-15 Time Controls – Historical – No Data Added	17
Figure 4-16 Time Controls – Historical Time	17
Figure 4-17 Time Controls – Toggle Button	18
Figure 4-18 Toggle Time Controls Panel – Play	18
Figure 4-19 Toggle Time Controls Panel – Stop	18
Figure 4-20 Start and End Time – Calendar Settings	19
Figure 4-21 Time Controls – Toggle On	19
Figure 5-1 Creating a New Folder	20
Figure 5-2 Creating a New Folder-Type Folder Name	20

Figure 5-3 New Folder Created	20
Figure 5-4 Settings	21
Figure 5-5 Run or Edit Mode Toggle Button	21
Figure 5-6 Edit Mode	21
Figure 5-7 Snap Pixel Settings	22
Figure 5-8 Sample Graphic	22
Figure 5-9 Trend - Value Animation.....	23
Figure 5-10 Value Animation Open in Gestalt Trend	23
Figure 5-11 Play Tab.....	23
Figure 6-1 Industrial App Store Home Page	25
Figure 6-2 Gestalt Trend Postcard.....	25
Figure 6-3 Gestalt Trend Home Page	25
Figure 6-4 Select Icon - Access to Left Side Panel	26
Figure 6-5 Access Dashboards and Folders	26
Figure 6-6 Dashboards Area	27
Figure 6-7 Personal Dashboards & Group Dashboards	27
Figure 6-8 Personal Dashboards – Folders and Dashboards	28
Figure 6-9 Sharing a Dashboard or Folder	28
Figure 6-10 Setting Up a User Share	28
Figure 6-11 New Share Available in Personal Dashboards	29
Figure 6-12 Share Accepted in Personal Dashboards	29
Figure 6-13 New Share Available in Personal Dashboards	30
Figure 6-14 Share Accepted in Personal Dashboards	30
Figure 6-15 Trend Menu	31
Figure 6-16 Play & Time Menus	31
Figure 6-17 Play Menu	31
Figure 6-18 Time Menu	32
Figure 6-19 Start and End Time – Calendar Settings	32
Figure 6-20 Play Tab.....	32
Figure 7-1 Creating a New Folder	33
Figure 7-2 Creating a New Folder-Type Folder Name	33
Figure 7-3 New Folder Created	33
Figure 7-4 Viewing a Dashboard in Trend	34



1 Purpose of Document

This document shows a first-time user how to authorize and select a datasource, accept a share of a dashboard or folder and navigate through the dashboards that have already been created in Gestalt PnID™ & Gestalt Trend™.



2 Access to the Industrial App Store

Select this link appstore.intelligentplant.com to log in to the Industrial App Store. Use either your LinkedIn, Google or Work account or register your organisation with the Industrial App Store.

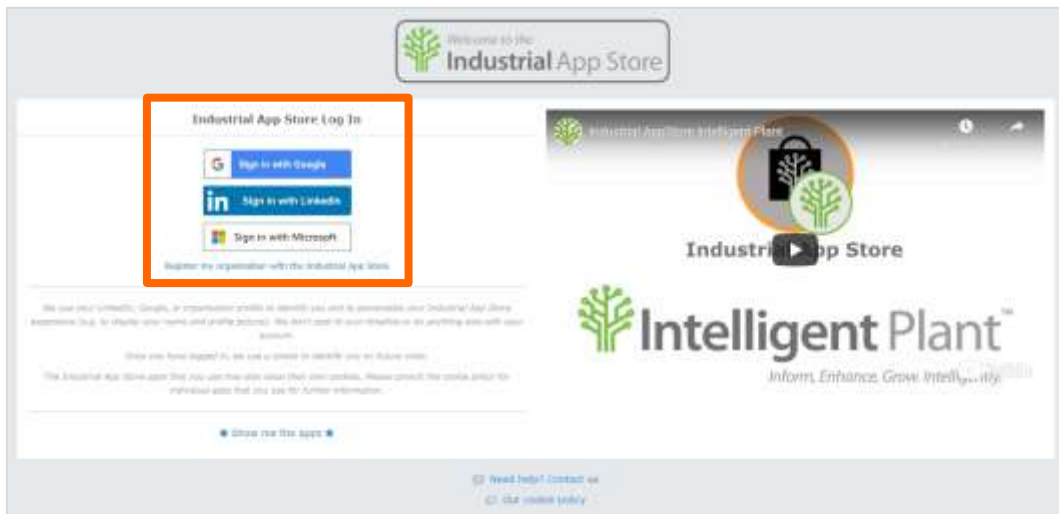


Figure 2-1 Access the Industrial App Store

You will be directed to the Industrial App Store home page.



Figure 2-2 Industrial App Store Home Page

Select Gestalt PnID.

Follow the steps on the next page or select the link below to see animated instructions on our App Store Wiki:

https://appstore.intelligentplant.com/wiki/doku.php?id=app_store_connect:authorize_apps_to_connect_to_your_data

3 Authorize Apps to Connect to Datasources

3.1 First Log In

The first time you (the user) logs into a new app you will be directed through the Industrial App Store log in procedure.

If the app requires special privileges, you will receive an Application Authorization prompt.

Select Choose Data Sources.

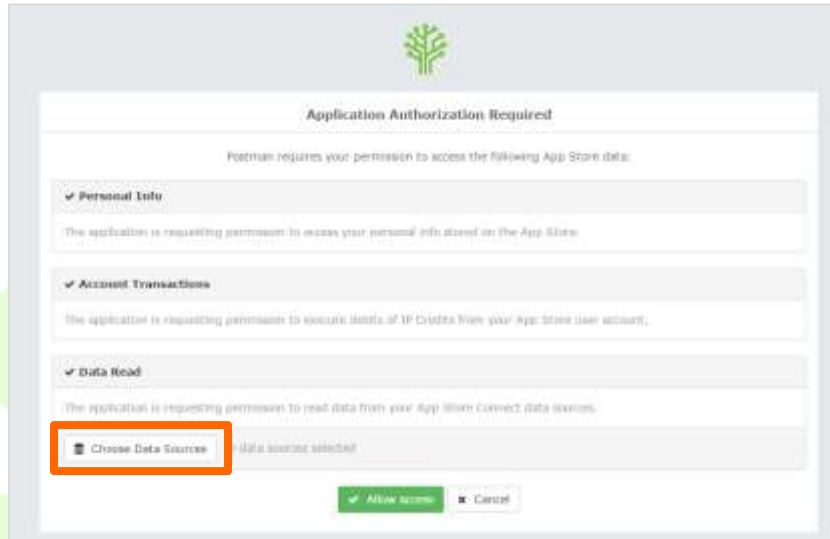


Figure 3-1 Application Authorization

You will see the datasources that are available to you. Should your required datasource name not exist in the list, contact the datasource owner and request access.

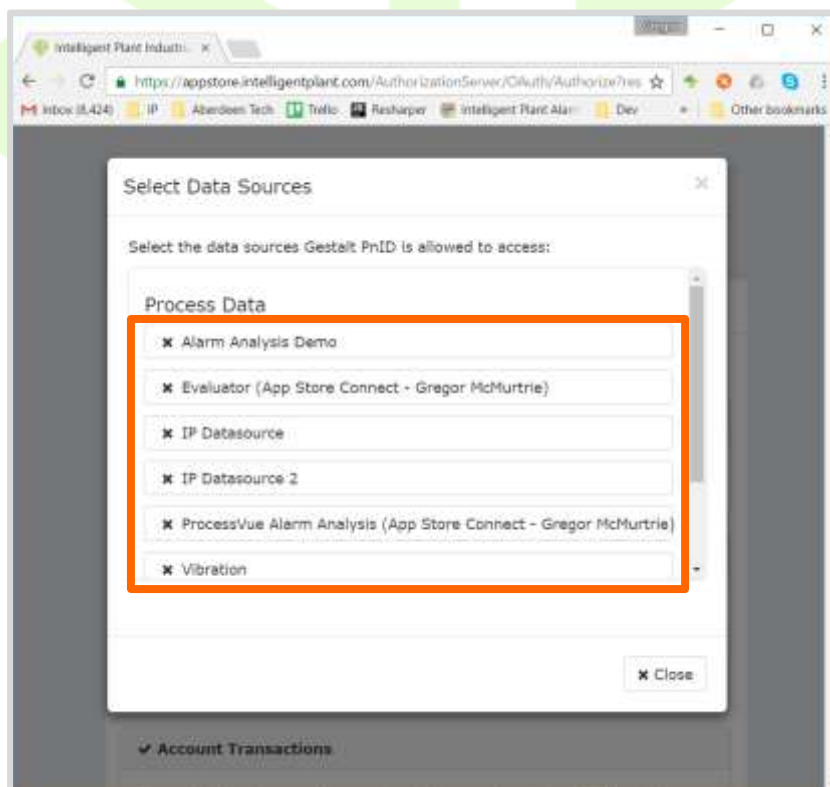


Figure 3-2 Select Datasources

To allow an app to access your datasource select the relevant datasource. The datasource name will turn green.

3.2 Subsequent Log Ins

The Industrial App Store remembers which privileges have already been granted. If you wish to edit an authorization or if a new datasource becomes available, you can select this from the home page.

Select My Account from the left side panel.

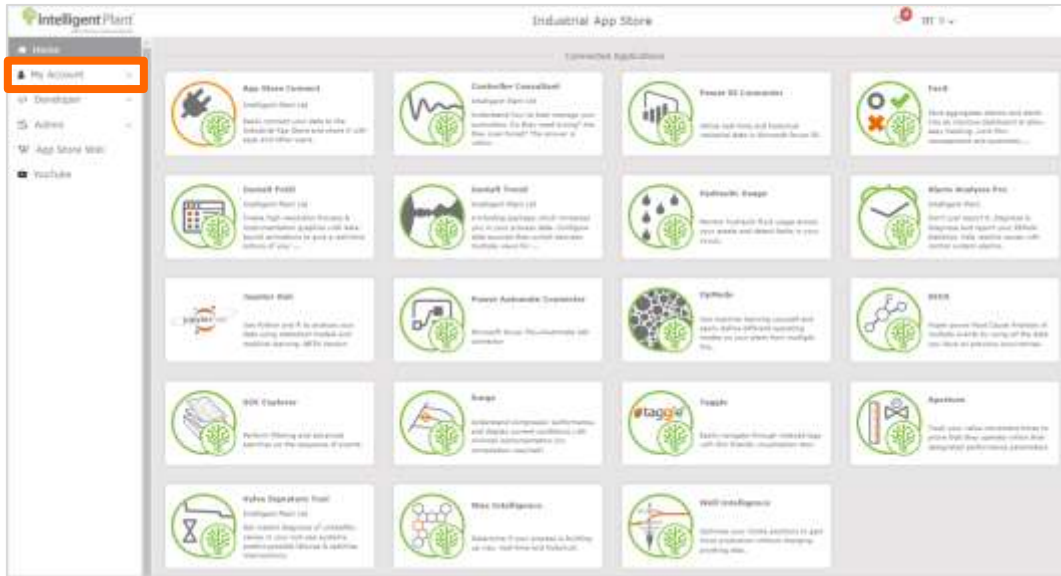


Figure 3-3 Home page – My Account

Select Apps.

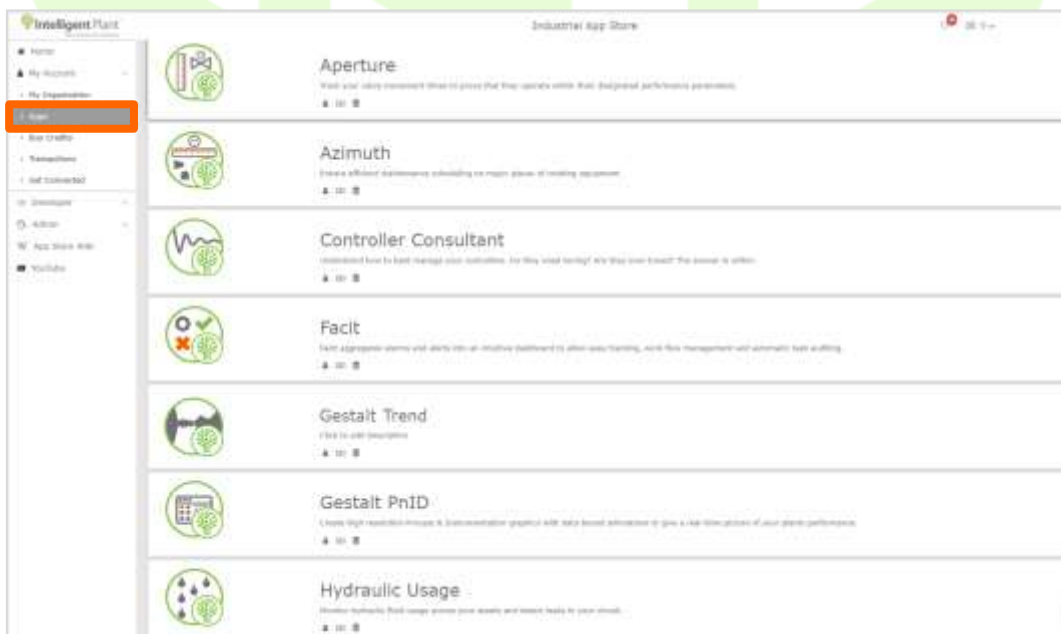


Figure 3-4 My Account – Authorized Applications

Selecting either Gestalt Trend or Gestalt PnID from the Authorized Applications area will authorize both apps.

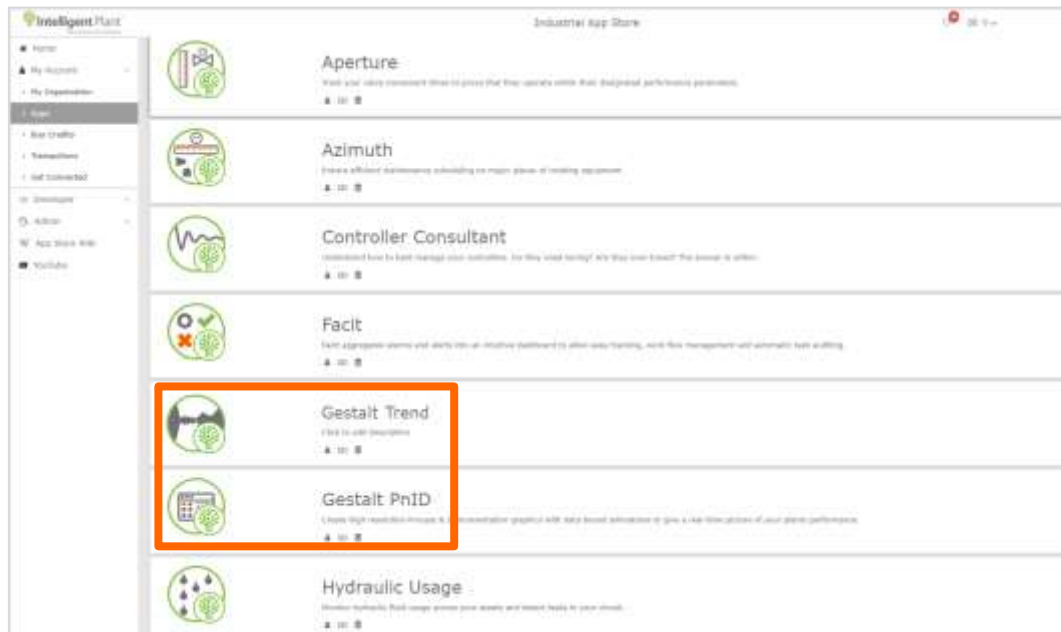


Figure 3-5 Authorize Applications in Your Account

Select the required Datasource Name (App Store Connect – UKABZAXXX0123.corpdirectory.net).



Figure 3-6 Select your Datasource

This will turn green once selected.



Figure 3-7 Datasource Selected

Select Home in the left side panel.

Note:

The datasource is now set up for both Gestalt Trend and Gestalt PnID.

4 Getting Started in Gestalt PnID

Should you wish to find out more information regarding this app, mouseover the app card to see the choice to either Start the app (which will take you directly to the home page of PnID) or select More info to find out more information about PnID.



Figure 4-1 Industrial App Store Home Page

On mouseover select the start tab option.



Figure 4-2 Gestalt PnID Card

You will then be directed to the home page in Gestalt PnID (Home.PnID).

Select any thumbnail on this page if you wish to view our demo dashboards. These can also be accessed from within the Demo folder in the left side panel.



Figure 4-3 Demo pages in Gestalt PnID

Select the icon at the top left of the page. This will open up the left side panel.



Figure 4-4 Select Icon – Access to Left Side Panel

Select Dashboards from the left side panel.



Figure 4-5 Left Side Panel Options - Dashboards

In the Dashboards area you can create a new page, save, export or import a file and view Personal and Group Dashboards.



Figure 4-6 Dashboard Options

4.1 Personal Dashboards & Group Dashboards

The Personal Dashboards area is where your own dashboards are kept. You can at any time choose to share these with other users or groups.

The Group Dashboards may be used for a specific project where there is a large amount of people requiring access.

You can set permissions on dashboards or folders to individual users or groups, and you can give either read, write or admin access.

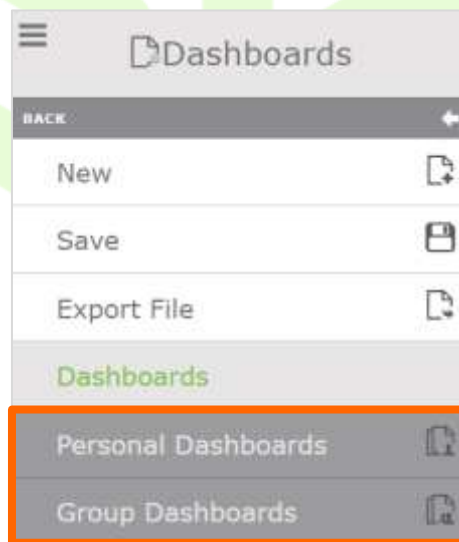


Figure 4-7 Personal Dashboards & Group Dashboards

Open Personal Dashboards to view the content in this area.

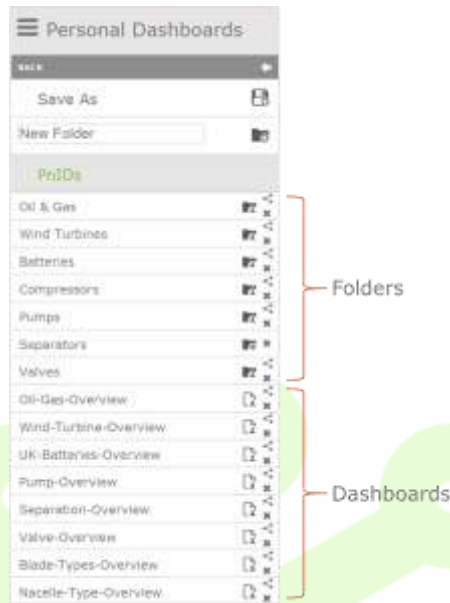


Figure 4-8 Personal Dashboards – Folders and Dashboards

To share a dashboard or a folder select the share icon at the top right of the dashboard or folder name.



Figure 4-9 Sharing a Dashboard or Folder

The Share pop-up appears. The drop-down list has the option to share with a user or group. Choose Users. Select the user you want to share with and at the bottom left the drop-down list gives the option to give that user Read, Write or Admin access. Select one of these options. Select Ok.



Figure 4-10 Setting Up a User Share

Note

If you would like to share with a user or group from a trusted organisation, you can check the include trusted sources. Follow the link for more information on setting up trusts.

https://appstore.intelligentplant.com/wiki/doku.php?id=general:organization_user_and_data_management:trust_management

4.2 Accepting a Share within Gestalt PnID

If a dashboard or folder has been shared with you, open the left side panel, then choose dashboards. Open Personal Dashboards. You will see New Share Available. Select the new dashboard and it will then be placed into your Personal Dashboards area.



Figure 4-11 New Share Available in Personal Dashboards

The dashboard or folder you have just accepted can now be seen within the Dashboards area in the left side panel.



Figure 4-12 Share Accepted in Personal Dashboards

4.3 Time Controls

Access Time Controls from the left side panel.

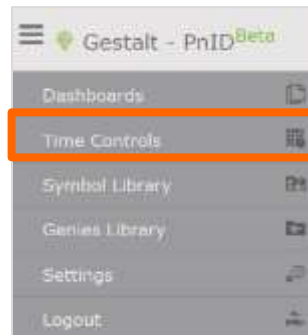


Figure 4-13 Time Controls

4.3.1 Real Time

By default, the time controls are set at real time (Historical toggle button is set to off).

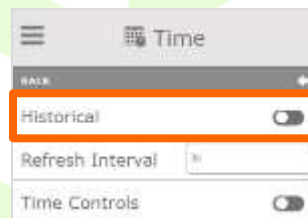


Figure 4-14 Time Controls – Real Time

4.3.2 Historical Time

In order for historical time to work you must link to your data (add tags). If you have not done this, a pop-up error will appear on the canvas. Select Ok to discard this pop-up.

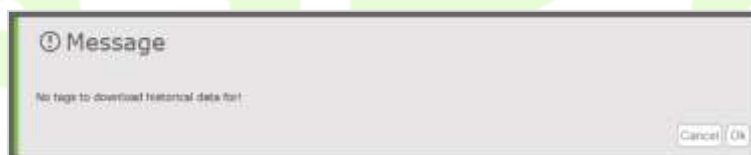


Figure 4-15 Time Controls – Historical – No Data Added

To change from real to historical time move the Historical toggle button to the right.

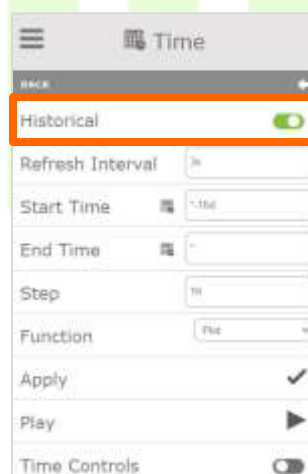


Figure 4-16 Time Controls – Historical Time

You can change the historical values by typing in your preferred range into the Refresh Interval, Start Time, End Time and Step.

Select Apply and press Play. If needed, change the Function to your preferred option from the dropdown menu, these are Plot, Interp, Max, Min, Avg, Raw.

To view the Data Controller, move the Time Controls toggle option to the right and see the Data Controller panel appear on the canvas.



Figure 4-17 Time Controls – Toggle Button

You will see the Data Controller panel appear at the top of your screen. Select the Play icon. This will automatically step through the available data and loop back round when it gets to the end.

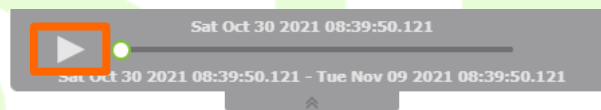


Figure 4-18 Toggle Time Controls Panel – Play

Select the stop icon to get playback to stop.

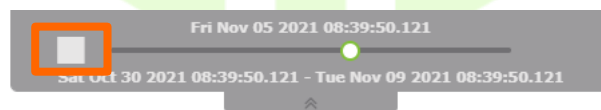


Figure 4-19 Toggle Time Controls Panel – Stop

While the time setting is at stop, you can mouse click on the slider (green/white circle) and step through time by using your keyboard arrows.

You can also change your start and end time by selecting the Start Time and End Time calendar icons.

Select the Start Time calendar icon and a calendar will pop-up. Select the month and year. You also have the option to set a specific time by moving the slider bars for hour, minute and second. Once you've chosen your settings, select Done to complete this process.

Now do the same for End Time by choosing the End Time calendar icon and going through the same procedure. Once all settings have been chosen select done to complete this process.

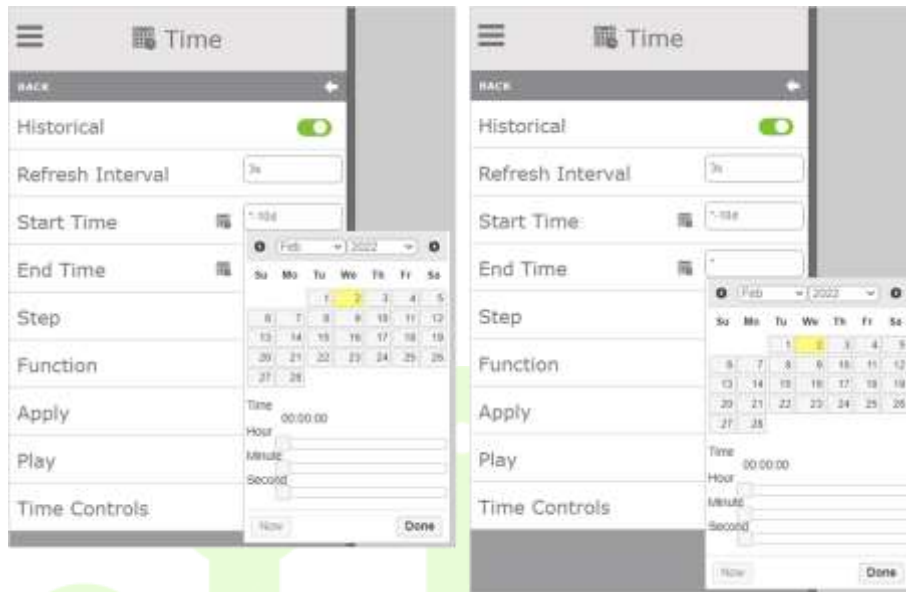


Figure 4-20 Start and End Time – Calendar Settings

When the Time Controls toggle button is moved to the right the time controls bar appears at the top of your page.



Figure 4-21 Time Controls – Toggle On

Press the play icon to see the data information within the graphic change as it moves through the historical time setting.

5 Gestalt PnID

You can edit a graphic that's not yours if you have been given write permission by the user who shared that graphic with you.

5.1 Creating a New Folder

Go to the left side panel and select Dashboards, then select Personal Dashboards. Place your cursor in the New Folder area and type in a name for the folder. Select the folder icon on the right or select enter on your keyboard to create the new folder.

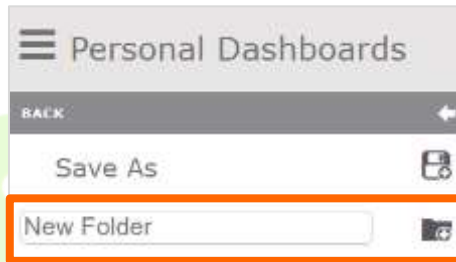


Figure 5-1 Creating a New Folder

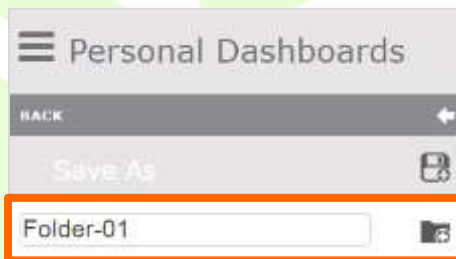


Figure 5-2 Creating a New Folder-Type Folder Name

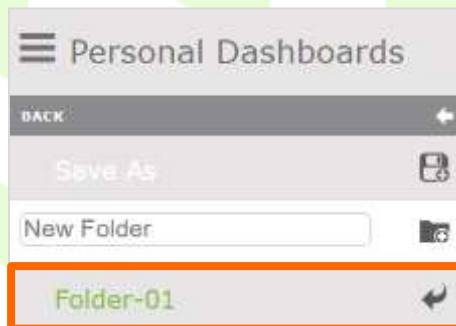


Figure 5-3 New Folder Created

You can now save a page into that folder by selecting Save As. A pop-up will appear with the name of the page you are going to save. You can rename the page if you wish. Select Ok. A pop-up will appear saying the page has been successfully saved. Select Ok.

5.2 Edit Mode

To make changes to your page you need to be in edit mode. In the left side panel select Settings.

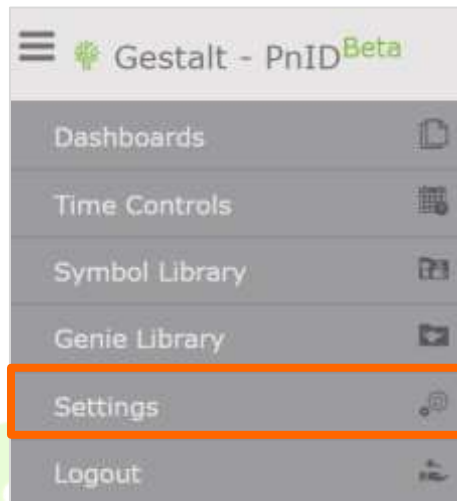


Figure 5-4 Settings

The toggle button moved to the left indicates that the page is in run mode. Move the button to the right to enable edit mode.

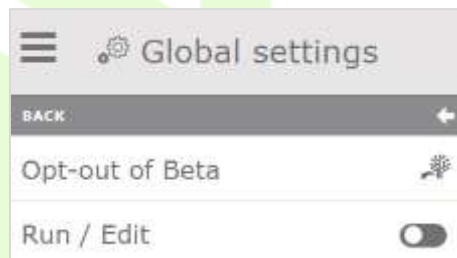


Figure 5-5 Run or Edit Mode Toggle Button

When you are in Edit mode a grid will appear on the canvas. The right-side panel appears immediately in edit mode. Here you can find all the options to draw and edit your page.

Using the grid and snap pixels options enables you to draw precisely in this drawing tool.



Figure 5-6 Edit Mode

Tip:

Before editing you can change the snap pixel setting from 12 to 3. This will make it easier to select items on your page.

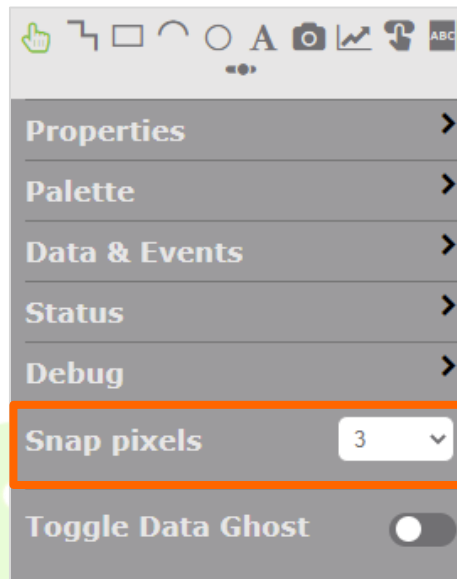


Figure 5-7 Snap Pixel Settings

Zoom into the area you wish to edit by using the wheel on your mouse.

5.3 Viewing a Dashboard

Zoom in or out of a dashboard using your mouse wheel. To Pan, quick scroll slightly forward or back with the mouse then use the right button on your mouse and click and drag across your page. If you have zoomed into an area within the graphic and then start panning, you will see a mini view of your page appear in the bottom right-hand corner of the screen. If there is a specific area you wish to view, using the left button on your mouse, click to select the area in the mini view that you wish to view. PnID will zoom into that area.



Figure 5-8 Sample Graphic

You can right click on any animation and open a trend for that specific tag.

Place your cursor over an animation and right click. A pop-up with different times will appear. Select one option and move your cursor over to the arrow on the right side. A further pop-up will appear with a window option. Select 'In New Window'.



Figure 5-9 Trend - Value Animation

A new tab will open taking you to Gestalt Trend. You can now see the Trend of the tag you selected in PnID. The Main Tab is in view.

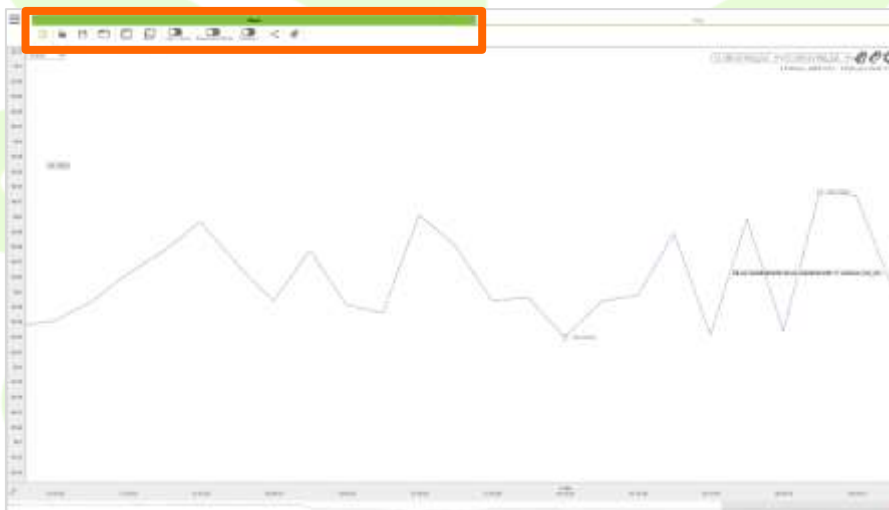


Figure 5-10 Value Animation Open in Gestalt Trend

Select the Play icon. This will automatically step through the available data and loop back round when it gets to the end.



Figure 5-11 Play Tab

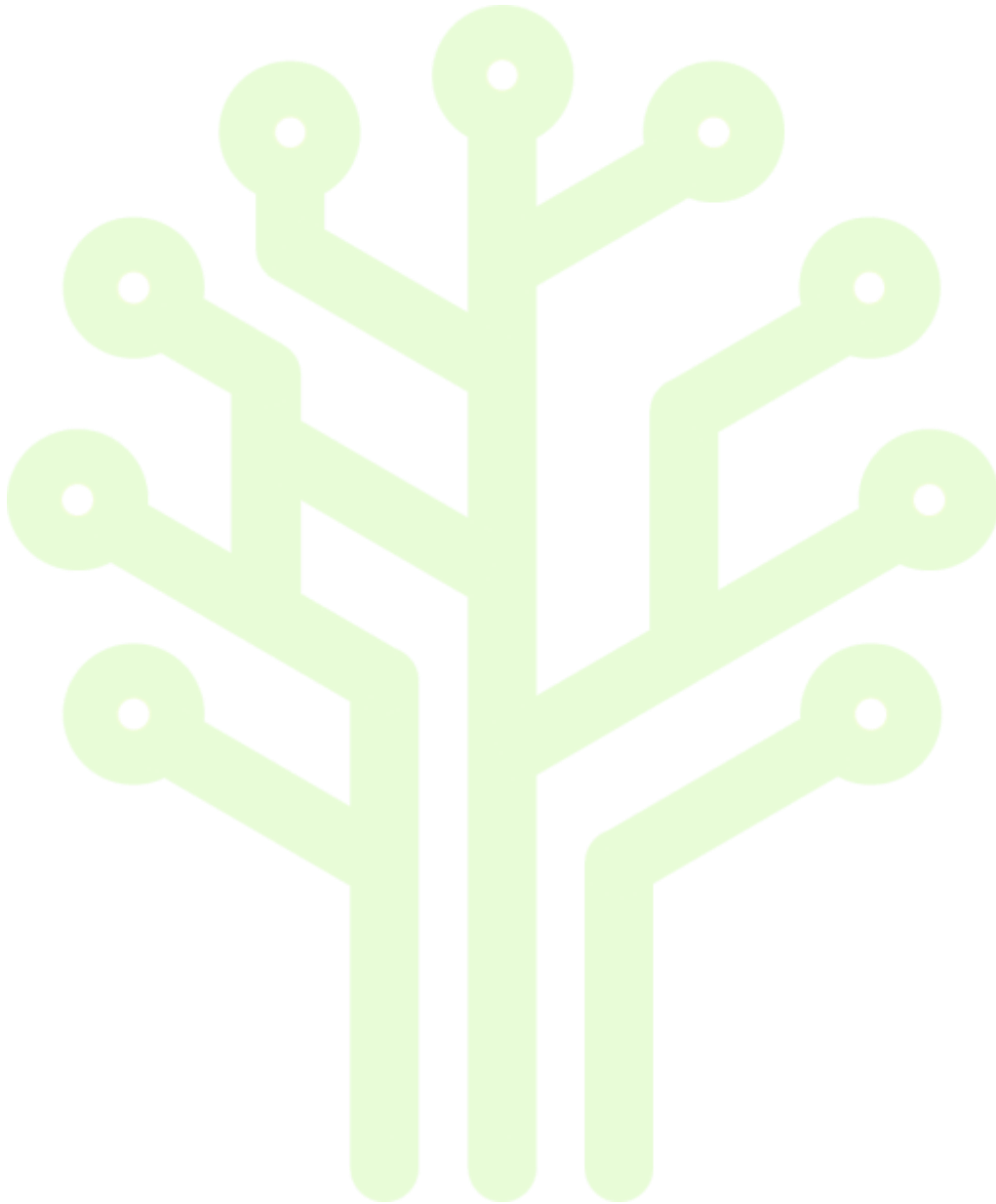
For further information on how to use Gestalt PnID you can view the profile in the Industrial App Store:

Here you will find links to user guides and tips and tricks:

<https://appstore.intelligentplant.com/Home/AppProfile?appId=2a59ca294ce2464cb14694b682294de5>

or access videos on our YouTube Channel:

<https://www.youtube.com/watch?v=rYoC7XuKj48&list=PLsVwx5rtV9c2ipTIX7SBDHXtHok5lpCTR>



6 Getting Started in Gestalt Trend

Should you wish to find out more information regarding the app, mouseover the app card to see the choice to either Start the app (which will take you directly to the home page of Trend) or select More info to find out more information about Trend.



Figure 6-1 Industrial App Store Home Page

On mouseover select the start tab option.



Figure 6-2 Gestalt Trend Postcard

You will then be directed to the home page in Gestalt Trend.

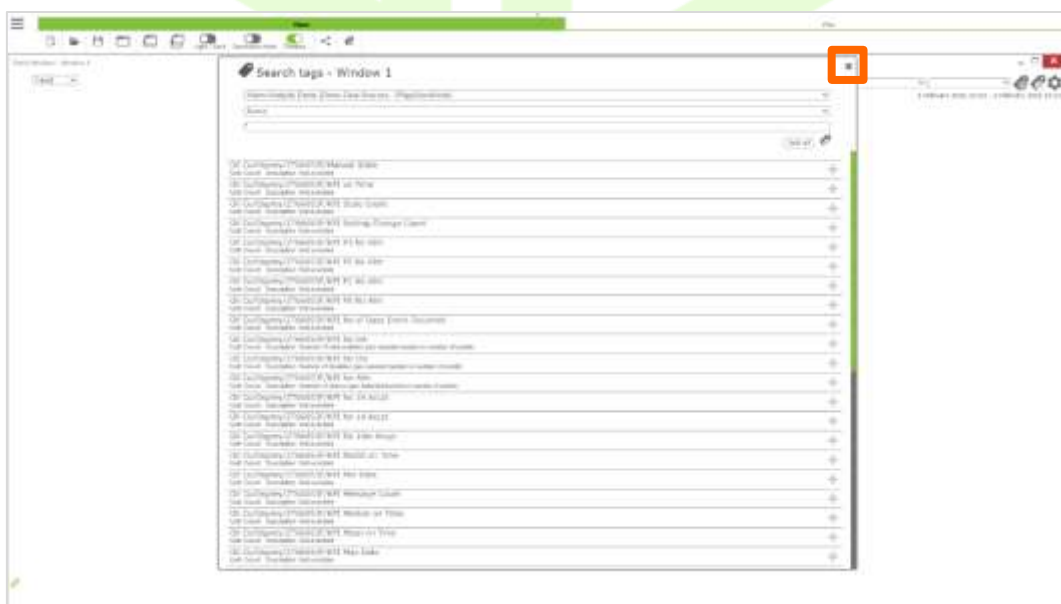


Figure 6-3 Gestalt Trend Home Page

Close the search tag pop-up by select the close option(x) at the top right of the pop-up.

Select the icon at the top left of the page. This will open up the left side panel.

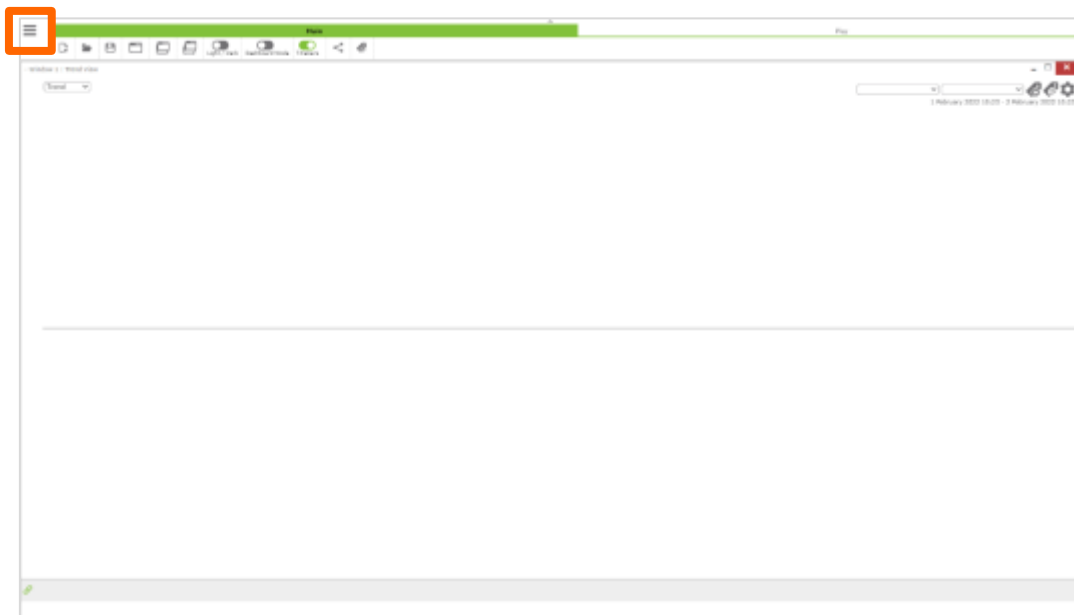


Figure 6-4 Select Icon - Access to Left Side Panel

Select Dashboards from the left side panel.

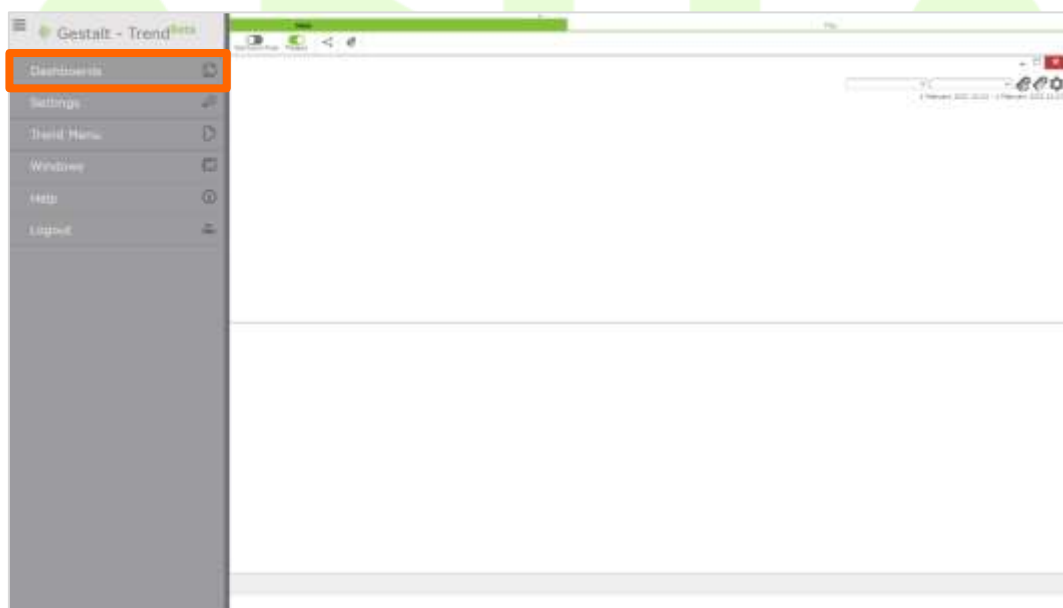


Figure 6-5 Access Dashboards and Folders

In the Dashboards area you can create a new page, save, export or import a file and view Personal and Group Dashboards.

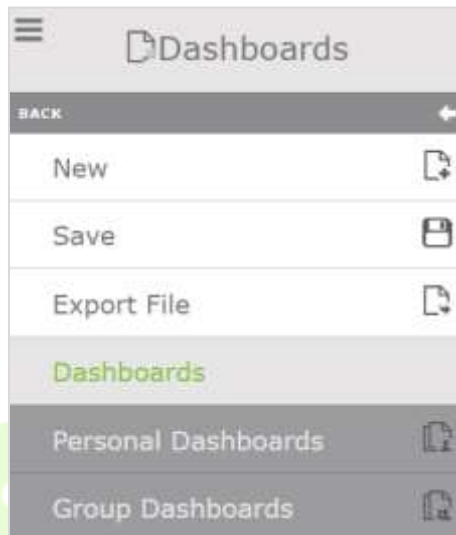


Figure 6-6 Dashboards Area

6.1 Personal Dashboards & Group Dashboards

The Personal Dashboards area is where your own dashboards are kept. You can at any time choose to share these with other users or groups.

The Group Dashboards may be used for a specific project where there is a large amount of people requiring access.

You can set permissions on dashboards or folders to individual users or groups, and you can give either read, write or admin access.

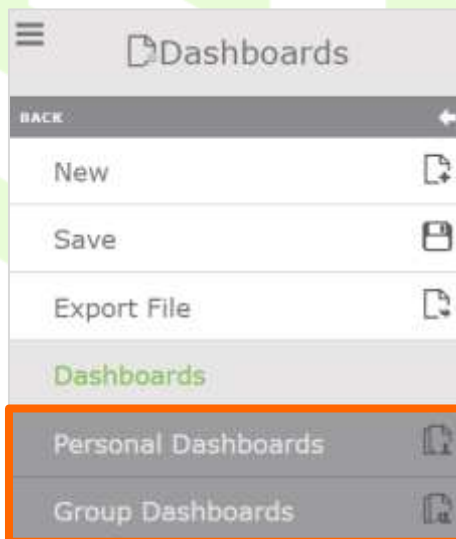


Figure 6-7 Personal Dashboards & Group Dashboards

Open Personal Dashboards to view the content in this area.

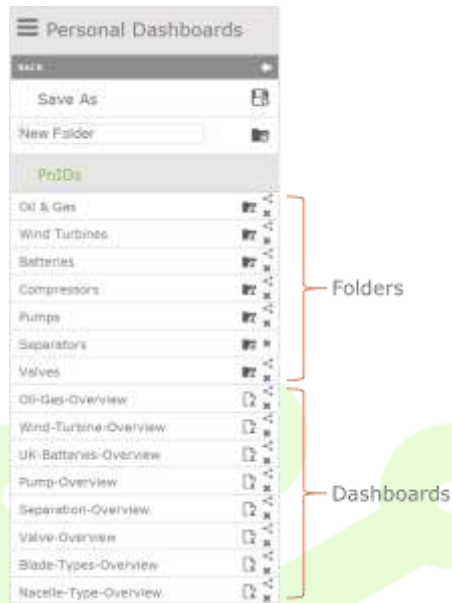


Figure 6-8 Personal Dashboards – Folders and Dashboards

To share a dashboard or a folder select the share icon at the top right of the dashboard or folder name.



Figure 6-9 Sharing a Dashboard or Folder

The Share pop-up appears. The drop-down list has the option to share with a user or group. Choose Users. Select the name you want to share with and at the bottom left the drop-down list gives the option to give that user Read, Write or Admin access. Select one of these options. Select Ok.



Figure 6-10 Setting Up a User Share

Note

If you would like to share with a user or group from a trusted organisation, you can check the include trusted sources. Follow the link for more information on setting up trusts.

[https://appstore.intelligentplant.com/wiki/doku.php?id=general:organization_user_and_data_management:trust_management&s\[\]=trusted&s\[\]=sources](https://appstore.intelligentplant.com/wiki/doku.php?id=general:organization_user_and_data_management:trust_management&s[]=trusted&s[]=sources)

6.2 Accepting a Share within Gestalt Trend

Accepting a share in Trend is exactly the same as Gestalt PnID.

If a dashboard or folder has been shared with you, open the left side panel, then choose dashboards. Open Personal Dashboards. You will see New Share Available. Select the new dashboard and it will then be placed into your Personal Dashboards area.

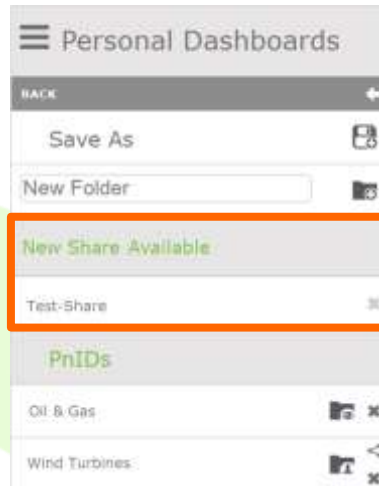


Figure 6-11 New Share Available in Personal Dashboards

The dashboard or folder you have just accepted can now be seen within the Dashboards area in the left side panel.



Figure 6-12 Share Accepted in Personal Dashboards

If a dashboard or folder has been shared with you, open the left side panel, then choose dashboards. Open Personal Dashboards. You will see New Share Available. Select the new dashboard and it will then be placed into your Personal Dashboards area.



Figure 6-13 New Share Available in Personal Dashboards

The dashboard or folder you have just accepted can now be seen within the Dashboards area in the left side panel.



Figure 6-14 Share Accepted in Personal Dashboards

6.3 Time Controls

The Time Controls can be accessed from the left side panel.

Select Trend Menu.

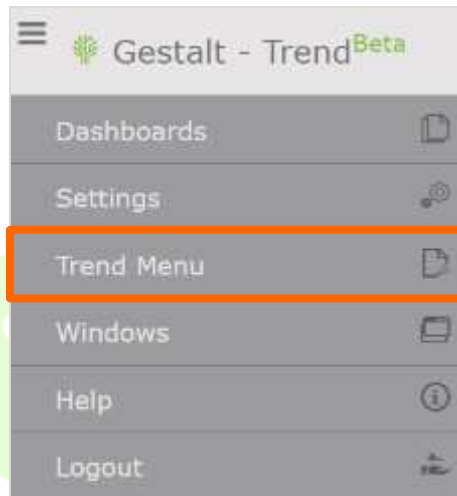


Figure 6-15 Trend Menu

The options here are Play Menu and Trend Menu.

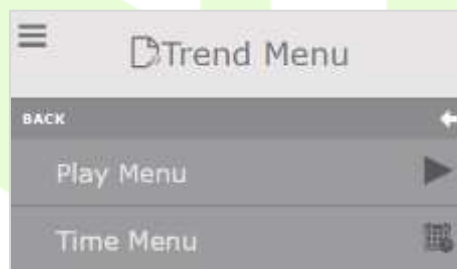


Figure 6-16 Play & Time Menus

6.3.1 Play Menu

The Play menu allows you to play through time that has already been set. You can also change the Playback Speed.

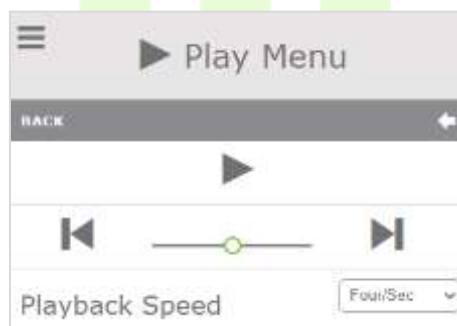


Figure 6-17 Play Menu

6.3.2 Time Menu

The Time menu allows you to revert to the previous query, toggle to relative or absolute time, set start and end times, choose a function from a drop-down list of either Plot, Interp, Max, Min, Avg or Raw. You can set an interval time, just type in the interval. If you have made any changes, select Apply to save those updates. Live updates toggle button can be moved to the right to enable.



Figure 6-18 Time Menu

The Start and End Time options follow the same procedures as Gestalt PnID.

Select the Start Time calendar icon and a calendar will pop-up. Select the month and year. You also have the option to set a specific time by moving the slider bars for hour, minute and second. Once you've chosen your settings, select Done to complete this process.

Now do the same for End Time by choosing the End Time calendar icon and going through the same procedure. Once all settings have been chosen, select done to complete this process.

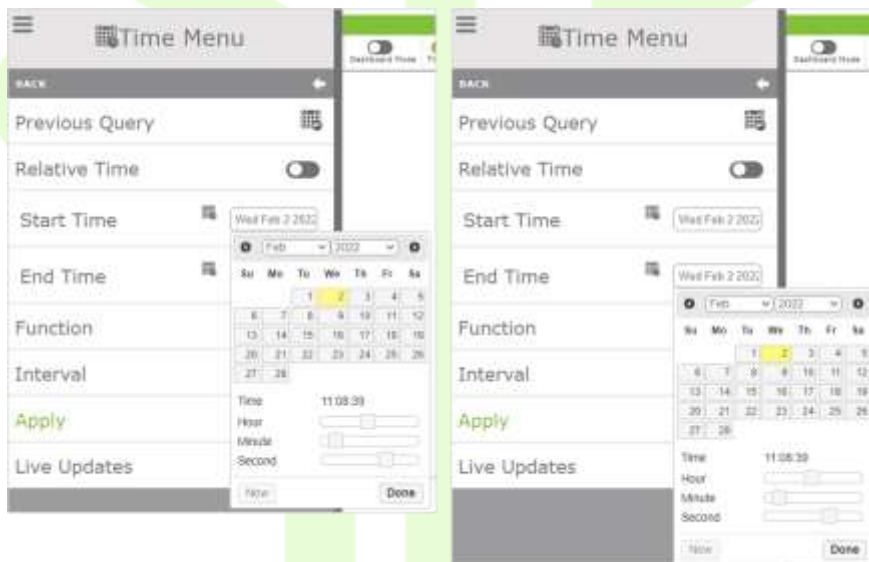


Figure 6-19 Start and End Time – Calendar Settings

Time Controls can also be updated from the Play tab on the main page of trend. These options are exactly the same as the Time Menu in the left side panel.



Figure 6-20 Play Tab

7 Gestalt Trend

7.1 Creating a New Folder

Creating a new folder in Trend is exactly the same as Gestalt PnID.

Go to the left side panel and select Dashboards, then select Personal Dashboards. Place your cursor in the New Folder area and type in a name for the folder. Select the folder icon on the right or select enter on your keyboard to create the new folder.

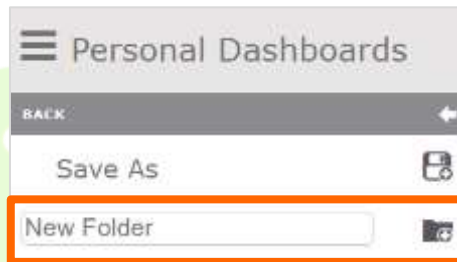


Figure 7-1 Creating a New Folder



Figure 7-2 Creating a New Folder-Type Folder Name

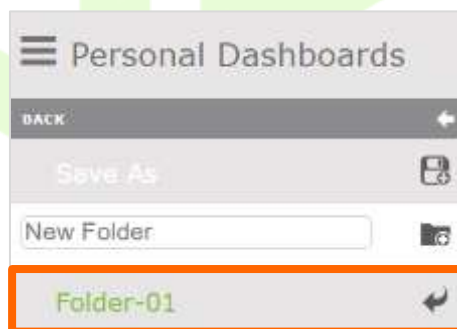


Figure 7-3 New Folder Created

You can now save a page into that folder by selecting Save As. A pop-up will appear with the name of the page you are going to save. You can rename the page if you wish. Select Ok. A pop-up will appear saying the page has been successfully saved. Select Ok.

You can edit a graphic that's not yours if you have been given write permission by the user who shared that graphic with you.

7.2 Viewing a Dashboard

Open Your Folder and choose a dashboard.

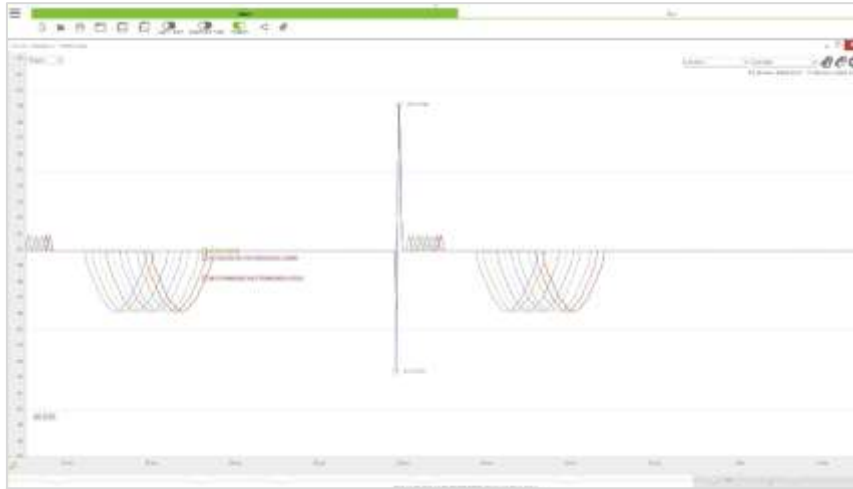


Figure 7-4 Viewing a Dashboard in Trend

Select the drop-down menu at the left-hand side of your page. Here you can select your view type to see your tags in a different view. These are Trend, PCP, FFT, Histogram, Limits, XY Scatter, CCGraph and CCMatrix.

If you have one or more tags in your trend, the tag that appears at the top of the list in the first box on the right side of your page is the Primary Trend, the second box is the Trend to Compare. You can change the placement of these tags by choosing different tags from the drop-down lists.

The icons next to the boxes are Add Tags, when selected enable a pop-up so that you can add new tags to your dashboard.

The Tag Manager enables a pop-up giving information on the tags you have in your dashboard. The Settings icon enables a pop-up allowing you to view information within a Settings tab and a Time tab that shows the time settings that are set within your dashboard. You can make changes to your dashboard from any of the options above.

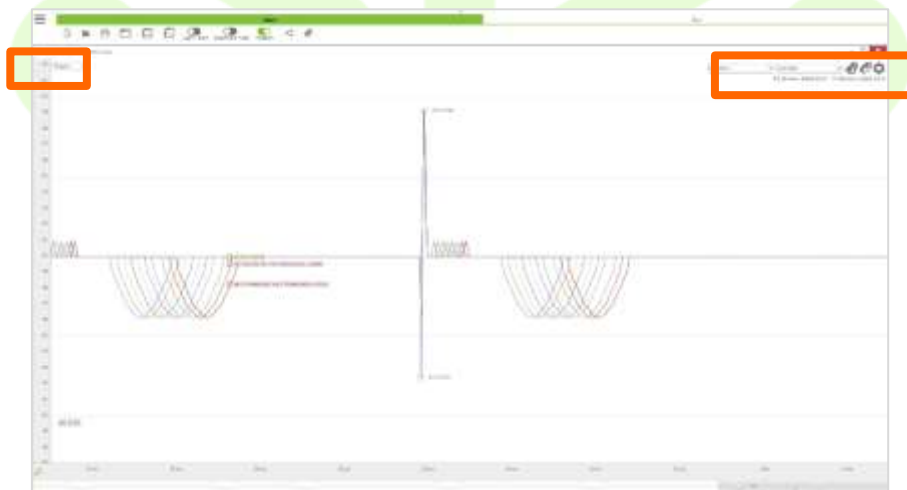


Figure 7-5 Trend View Options

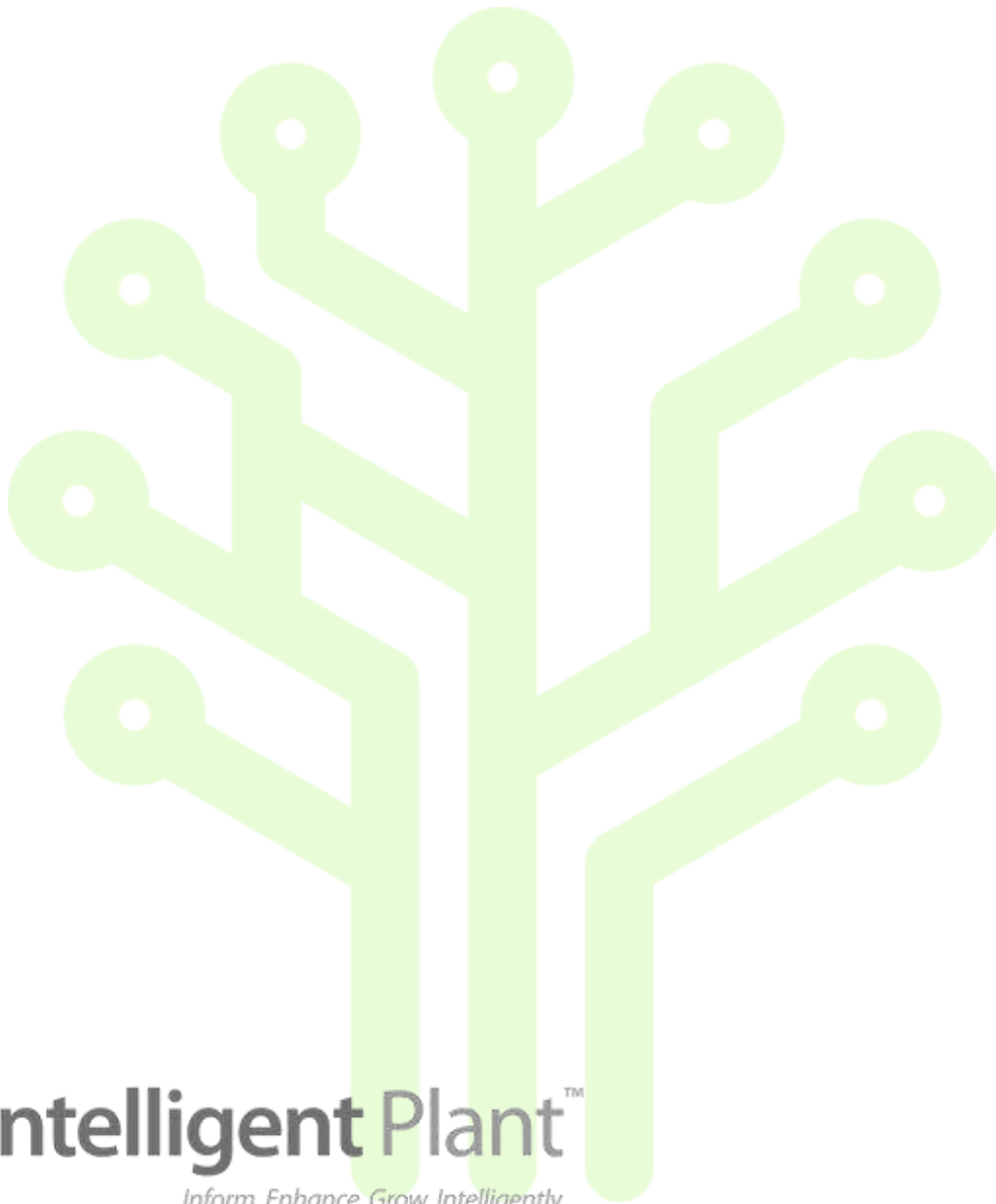
For further information on how to use Gestalt Trend you can view the profile in the Industrial App Store:

Here you will find links to the user guide:

<https://appstore.intelligentplant.com/Home/AppProfile?appId=3fbd54df59964243aa9cf4b3f04823f6>

or access videos on our YouTube Channel:

https://www.youtube.com/watch?v=SjcwpxY8N3M&list=PLsVwx5rtV9c1eNpX_g4x_g7hBPXIC989z



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