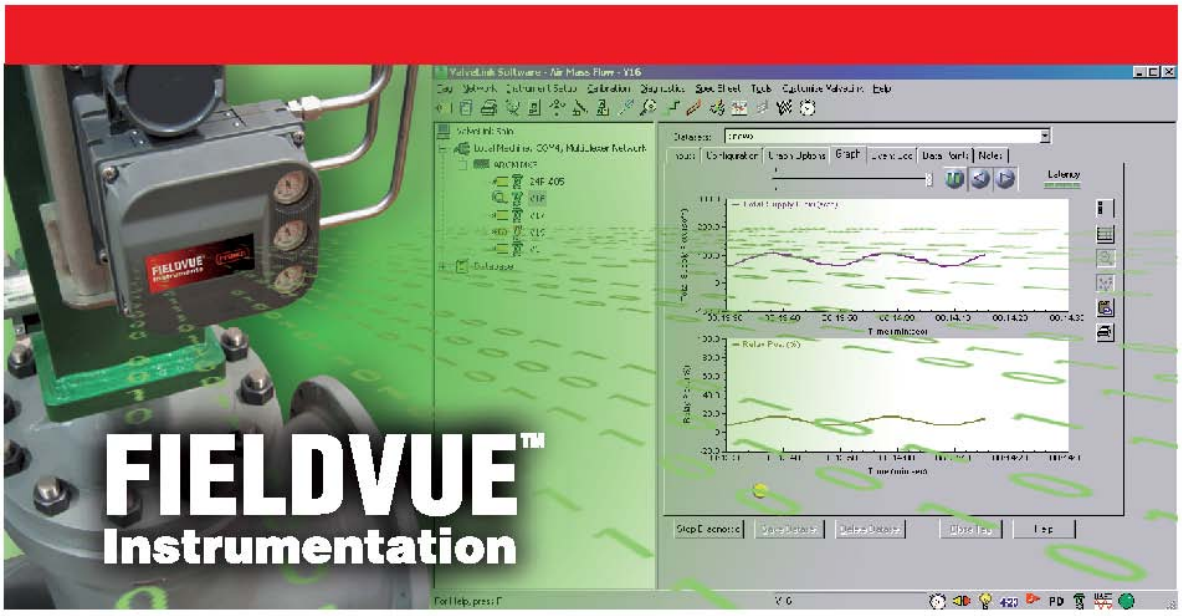
Quick Start Guide
D102813X012
August 2010

ValveLink™ Software



ValveLink Software Quick Start Guide

ValveLink™ Solo
AMS ValveLink™ SNAP-ON™
ValveLink™ DTM
ValveLink™ PLUG-IN for PRM®

Refer to the ValveLink Software Installation CD for the ValveLink Software Installation Guide (D102800X012)

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Table of Contents

Note

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Section 1

Quick Start for ValveLink Solo for HART Instruments

This section contains quick-start information for ValveLink Solo connected to HART communicating instruments through a HART modem. Information about connecting HART multiplexers is available in the ValveLink software Installation Guide. For more information on using ValveLink Solo, see ValveLink help. For information on using ValveLink software toolbar buttons, see section 6 of this document. Section 7 provides information on ValveLink help.

Note

This section assumes ValveLink Solo is installed. The ValveLink Software Installation Guide, found on the ValveLink Software installation CD, provides detailed installation information.

Step 1: Attach the HART modem to the computer

Note

If you do not have a HART modem or FIELDVUE digital valve controller available, proceed to Step 3.

Attach the HART modem to the serial port (COM port) selected during installation.

Step 2: Attach the HART modem to the FIELDVUE instrument

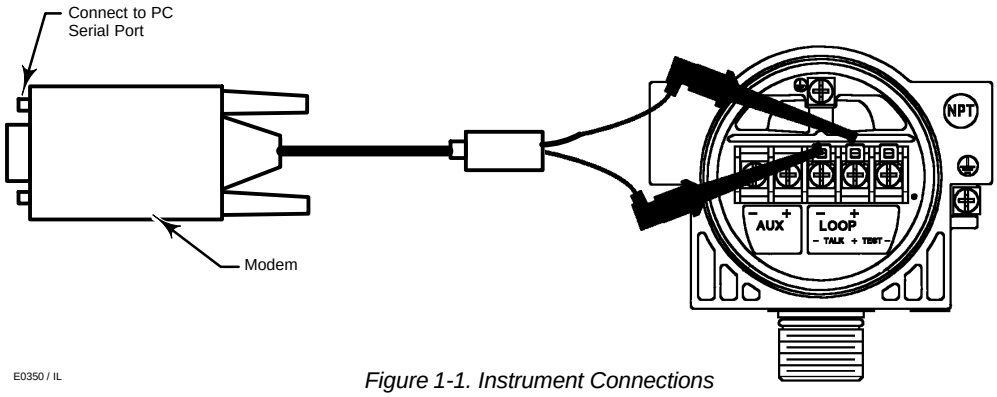


Figure 1-1. Instrument Connections

Clip the HART modem leads to the FIELDVUE instrument TALK terminals.

Apply 4-20 mA power to the FIELDVUE Instrument LOOP + and – terminals.

Step 3: Start ValveLink Solo

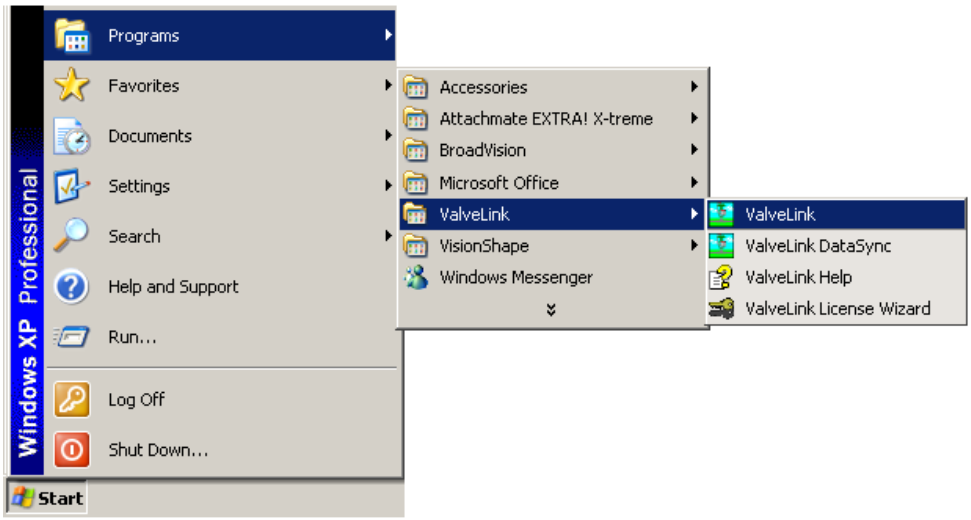


Figure 1-2. Starting ValveLink Solo

Click the Start button. From the Start menu select Programs>ValveLink>ValveLink.

Step 4: Log in

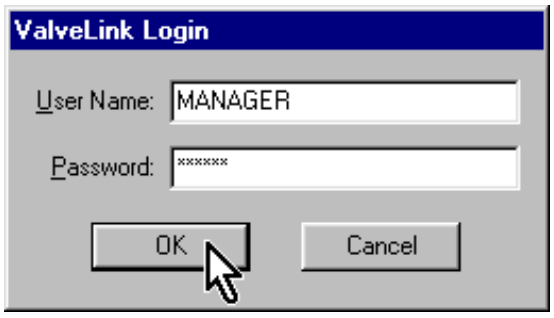


Figure 1-3. Logging in as MANAGER.

Log in to ValveLink Solo with the Default User Name and Password
Default User Name: MANAGER
Default Password: FALCON

Click OK.

Note

For full access to ValveLink Solo features you must discontinue use of the default name and password. Create security groups and assign new user names and passwords, then logout and login as a new user.

Step 5: Add a New Security Group

From the ValveLink Solo menu bar, select: Customize ValveLink>Security Groups.

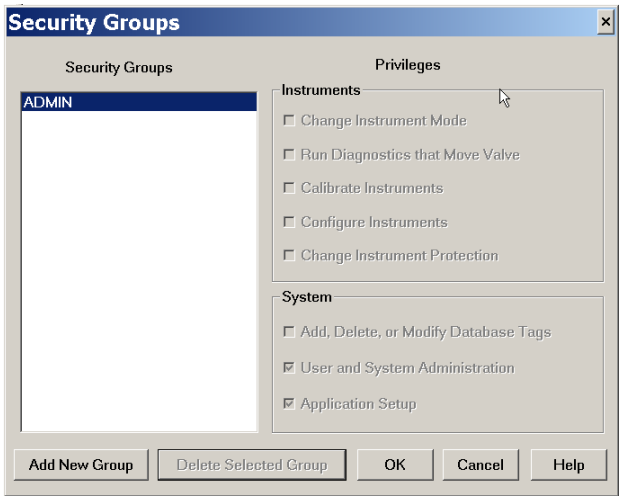


Figure 1-4. Adding a New Security Group

Click the Add New Group button.

Figure 1-5. Naming the New Security Group

Type a name for the new security group, then click the OK button.

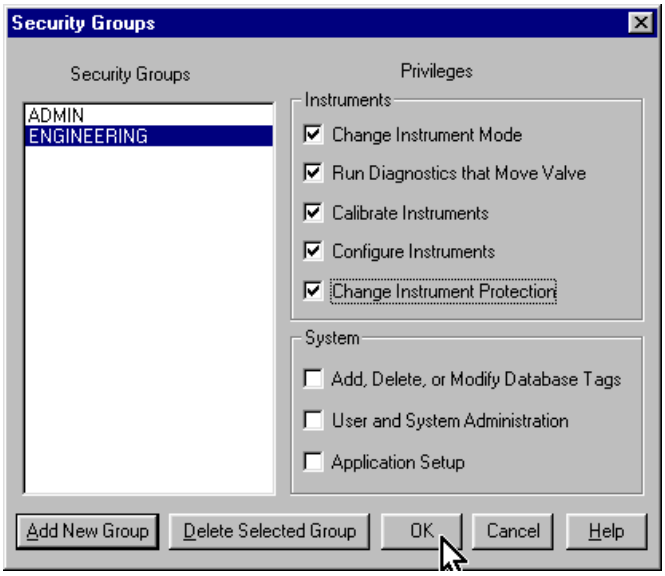


Figure 1-6. Assigning Privileges to the New Security Group

Select the privileges accessible to this group and click OK.

Step 6: Add a New User Account

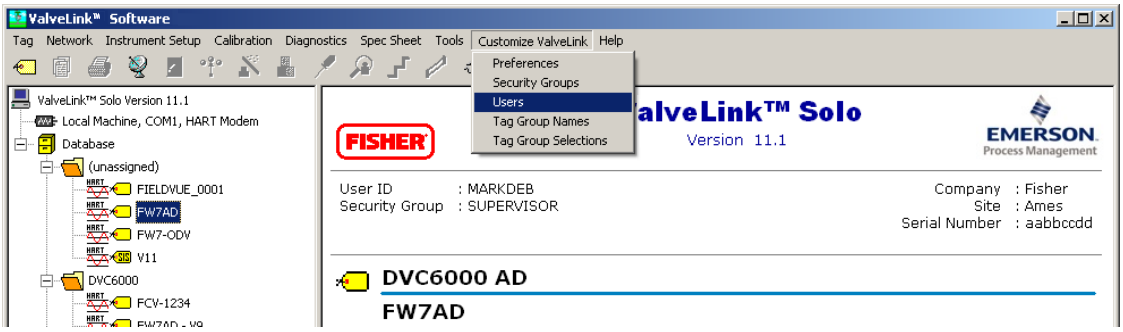


Figure 1-7. Selecting Users

From the menu bar, select: Customize ValveLink>Users.

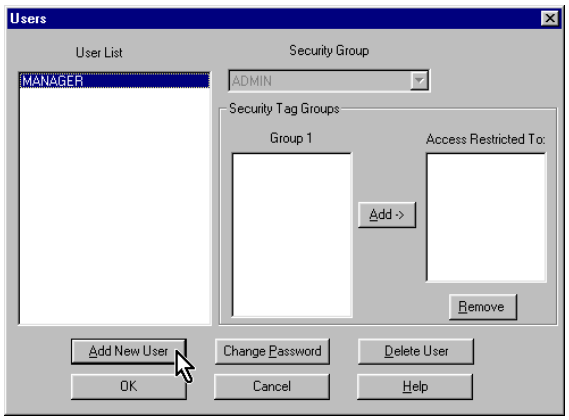


Figure 1-8. Adding a New User

Click the Add New User button.

Figure 1-9. Entering the New User Name and Password

Type in a user name and password. Then type the password again to verify it. Click OK.

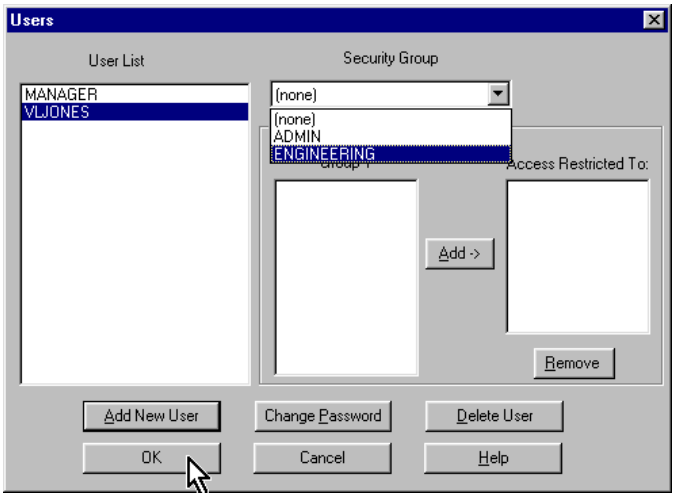


Figure 1-10. Assigning a Security Group to the New User

Click on the new user name to highlight it. Click the list box arrow to the right of the Security Group box and select the desired security group. Click OK.

Step 7: Log Out

Figure 1-11. Selecting Exit/Log Out

From the ValveLink Solo menu bar, select: Tag>Exit/Log Out.

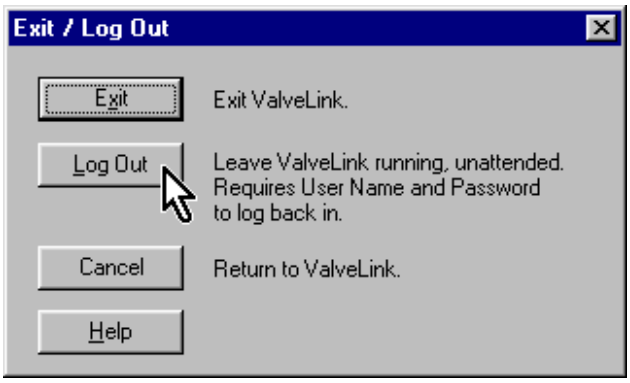


Figure 1-12. Logging Out

Click the Log Out button.

Step 8: Log In as a New User

Figure 1-13. Logging In

Click the ValveLink Solo Log In button.

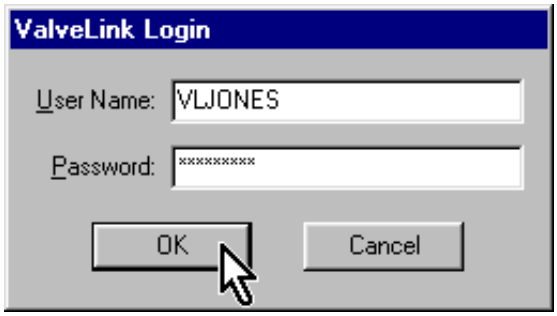


Figure 1-14. Logging in as New User

Enter your user name and password. Click OK.

Step 9: Double click on the valve symbol to open the Status diagnostic

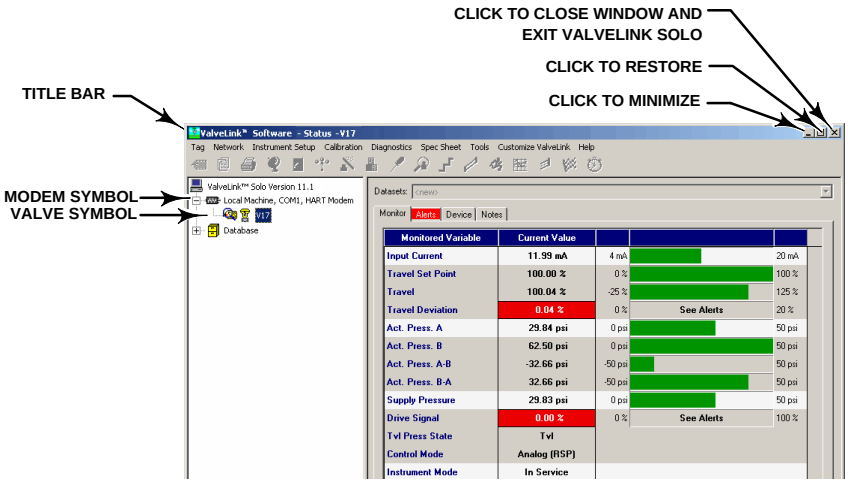


Figure 1-15. Device Connection View Showing Connected Devices

When ValveLink Solo starts up, it displays the connected devices in the left pane of the window (Device Connection View).

Double click on the valve symbol to open the Status Diagnostic.

Note

If you do not see a valve symbol, you may not be connected to a FIELDVUE instrument. Recheck Step 1 and Step 2, then right click on the HART modem symbol and select Scan for New. If you still do not see a valve symbol, refer to ValveLink Help.

Step 10: Click the Start Monitoring button to begin monitoring instrument and valve parameters

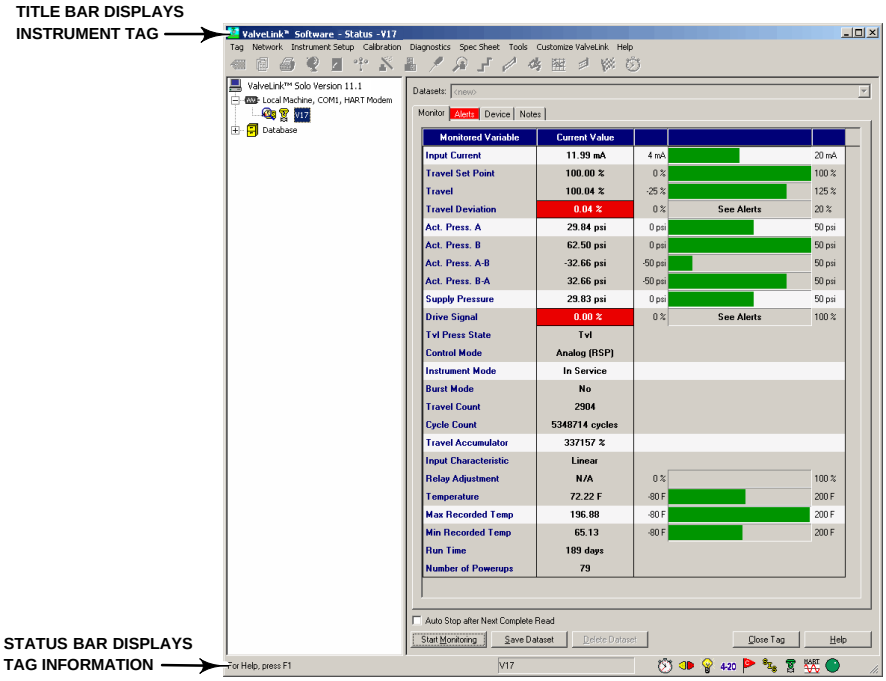


Figure 1-16. Start Monitoring

Section 2

Quick Start for ValveLink Solo for FOUNDATION fieldbus Instruments

This section contains quick start information for ValveLink Solo connected to a single FOUNDATION fieldbus instrument. For more information about connecting to a single instrument, or for information about connecting to an H1 segment, see the ValveLink software Installation Guide. For more information on using ValveLink Solo see ValveLink software help. For information on using ValveLink software toolbar buttons, see section 6 of this document. Section 7 provides information on ValveLink software help.

Communicating with FOUNDATION fieldbus instruments requires National Instruments NI-FBUS hardware and software be installed on the computer running ValveLink Solo.

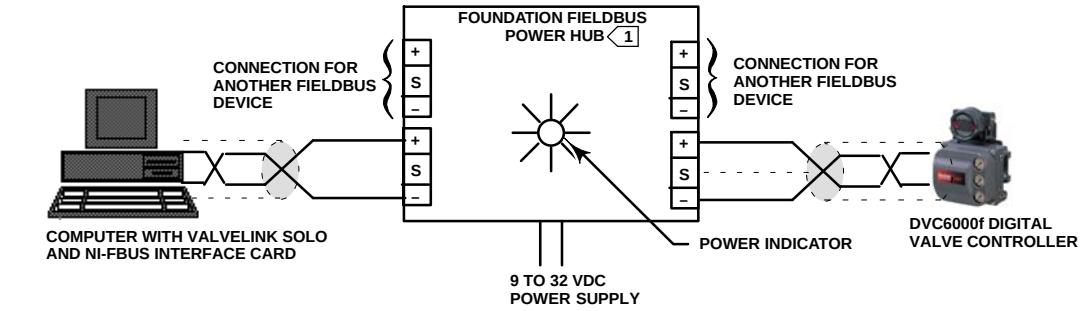
Note

This section assumes ValveLink Solo and the associated National Instruments hardware and software are installed. The ValveLink Software Installation Guide, found on the ValveLink software installation CD, provides information for installing these components.

Step 1: Connect the computer to a FOUNDATION fieldbus digital valve controller

Figure 2-1 shows how to connect to a single instrument with a fieldbus power hub (Relcom part number FCS-PH-110-PL, or equivalent). The power hub provides a power supply and double terminator. Up to four devices can be connected to the Relcom power hub. The computer with ValveLink Solo and the NI-FBUS interface card is considered as one device. This product is used for bench testing. It is not designed for field applications.

For more information on connecting to fieldbus instruments, see the ValveLink software Installation Guide.



NOTE
1 RELCOM PART NUMBER FCS-PH-110-PL OR EQUIVALENT

Figure 2-1. Typical Connection to a Single FOUNDATION fieldbus Digital Valve Controller

Step 2: Start ValveLink Solo

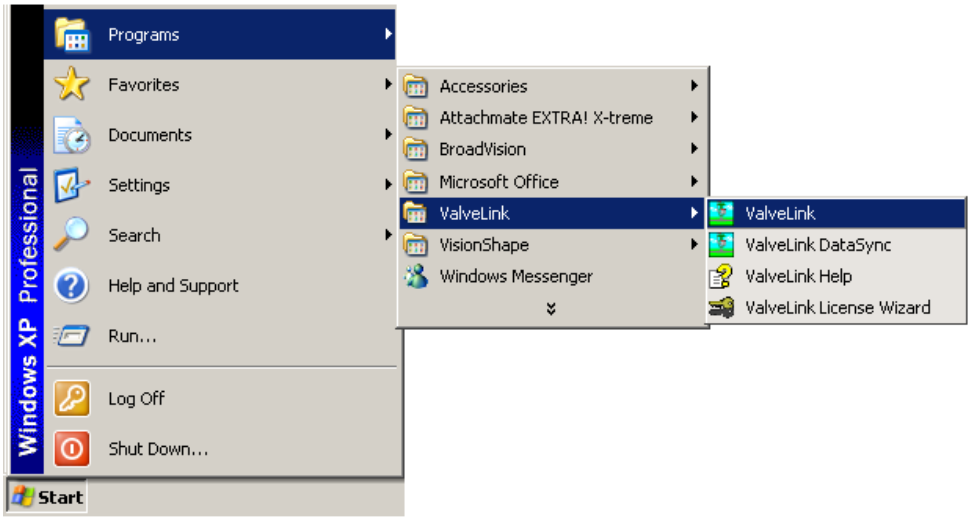


Figure 2-2. Starting ValveLink Solo

Click the Start button. From the Start menu select: Programs>ValveLink>ValveLink.

When you start ValveLink Solo it will automatically start National Instruments Fieldbus (NI-FBUS) software if installed. If ValveLink Solo is shutdown without properly exiting the software, NI-FBUS will continue to run. So, before starting ValveLink Solo be sure NI-FBUS software is shut down. ValveLink Solo will not start if NI-FBUS software is running. A blue box icon in the system tray in the lower right corner of the screen (figure 2-3) indicates when NI-FBUS software is running.

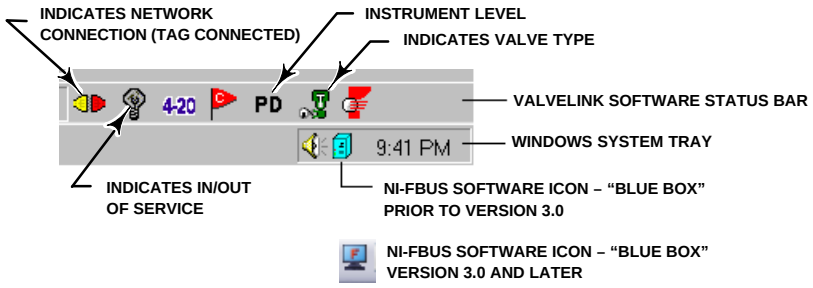


Figure 2-3. Windows System Tray

Step 3: Log in

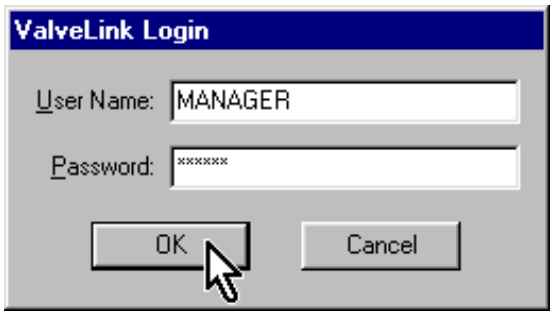


Figure 2-4. Logging in as MANAGER

Login to ValveLink Solo with the Default User Name and Password:
Default User Name: MANAGER
Default Password: FALCON

Click OK.

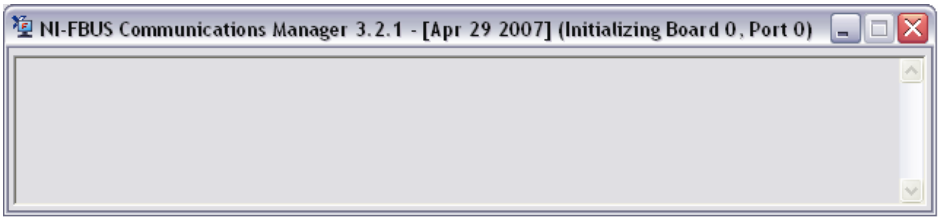


Figure 2-5. ValveLink Solo NI-FBUS Startup Window

ValveLink Solo starts the NI-FBUS software. As NI-FBUS software initializes, the startup window, shown in figure 2-5, appears. Do not stop the initializing process so that ValveLink Solo may start up successfully. During this time, ValveLink Solo is “listening” to see if it is connected to a fieldbus segment controlled by a Link Active Scheduler (LAS). If it is, then it starts the NI-FBUS Communications Manager in the non-LAS mode and the process continues, as indicated by the box shown in figure 2-7.

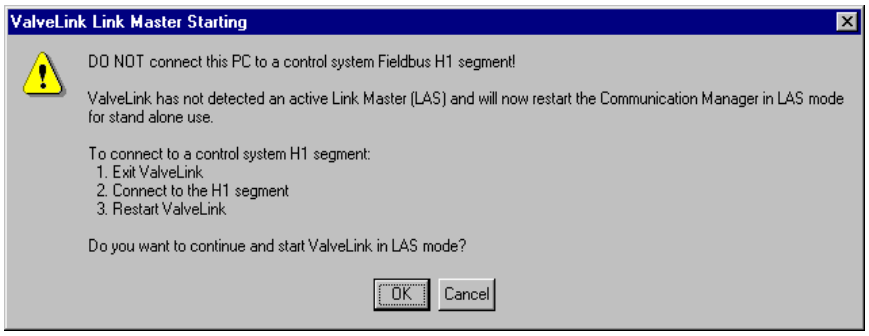


Figure 2-6. ValveLink Link Master Starting Window

If you are not connected to a segment where a Link Active Scheduler is running, ValveLink Solo starts the Communications Manager in the LAS mode as indicated in the window shown in figure 2-6.

Step 4: Click OK to continue the initializing process.

After ValveLink Link Master Starting window disappears, the NI-FBUS startup window again appears temporarily to complete the initializing process. The last window states that NI-FBUS software is running and cautions you not to kill the process or the process will not be complete, as shown in figure 2-7.

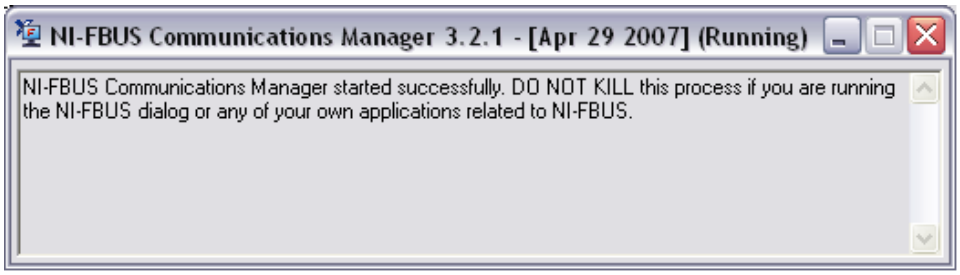


Figure 2-7. ValveLink Link Master NI-FBUS Running Window

Note

The Link Active Scheduler (LAS) controls traffic on the H1 segment. For an active H1 segment, the LAS function is provided by the host system or another FOUNDATION fieldbus device. When ValveLink Solo is connected (to either an active segment or a single instrument), the NI-FBUS interface card waits to see if the LAS is present. If not, the NI-FBUS interface card provides the LAS function. Therefore, to avoid conflict between the LAS function in the NI-FBUS interface card and LAS on the active segment, do not disconnect ValveLink Solo from a single instrument and connect it to an active segment without first shutting down ValveLink Solo.

WARNING

To avoid personal injury or property damage due to loss of process control, do not connect the computer to an active H1 segment while ValveLink Solo or NI-FBUS software is running. Doing so could interfere with Link Active Scheduler (LAS) operation.

Note

For full access to ValveLink Solo features you must discontinue use of the default name and password. Create security groups and assign new user names and passwords, then logout and login as a new user.

Step 5: Add a New Security Group

Figure 2-8. New Security Group

From the ValveLink Solo menu bar, select:
Customize ValveLink>Security Groups.

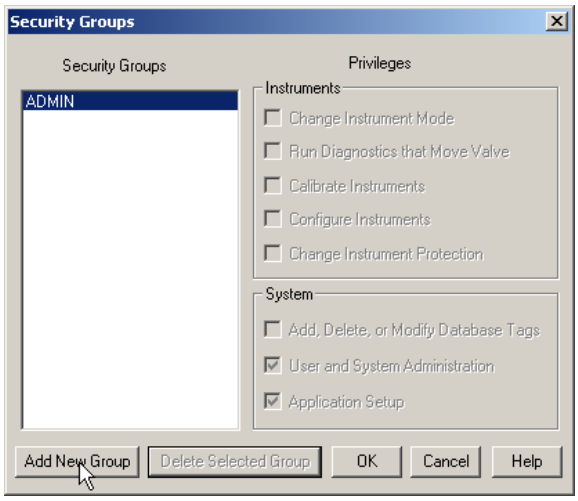


Figure 2-9. Security Groups Window

Click the Add New Group button.

Figure 2-10. Add New Group Window

Type a name for the new security group, then click the OK button.

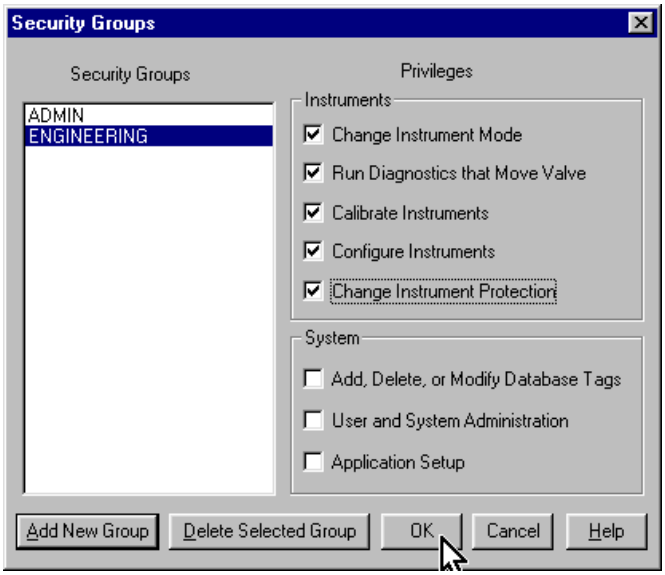


Figure 2-11. Security Groups Window

Select the privileges accessible to this group and click OK.

Step 6: Add a New User Account

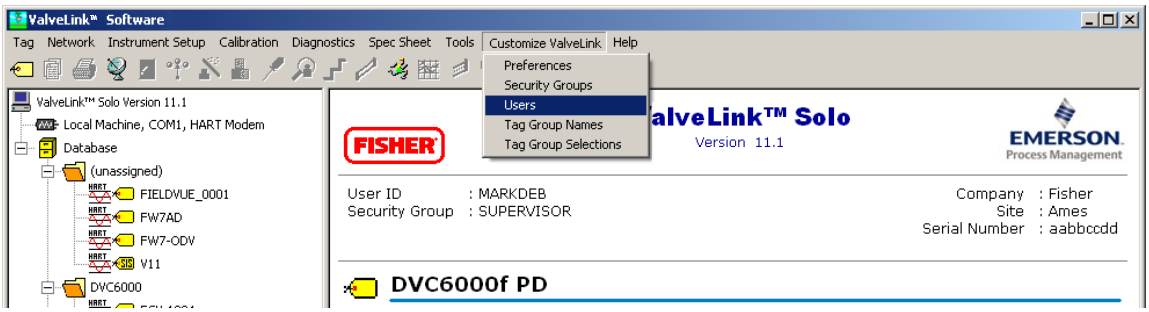


Figure 2-12. Add New User

From the menu bar, select Customize ValveLink>Users.

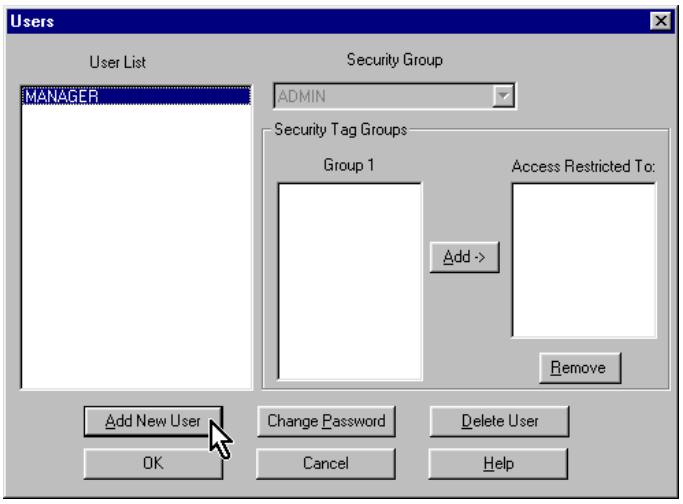


Figure 2-13. Users Window

Click the Add New User button.

Figure 2-14. Add New User Window

Type in a user name and password. Then type the password again to verify it. Click OK.

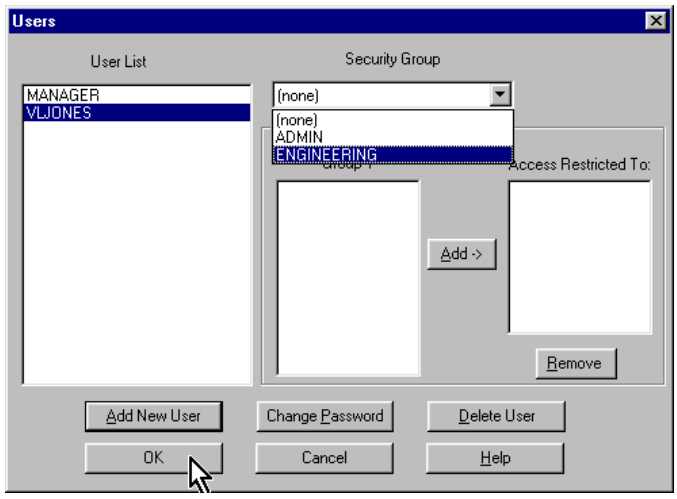


Figure 2-15. Selecting Security Group

Click on the New User name to highlight it. Click the list box arrow to the right of the Security Group box and select the desired security group. Click OK.

Step 7: Log Out

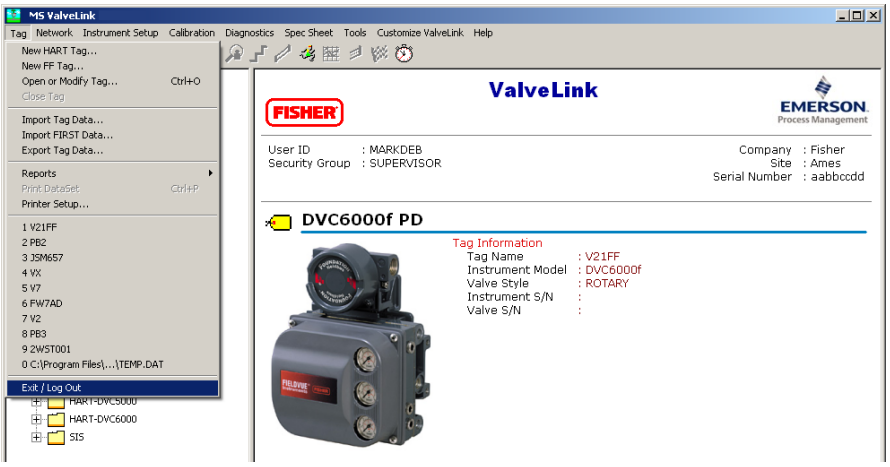


Figure 2-16. Log Out

From the ValveLink Solo menu bar, select:
Tag > Exit / Log Out.

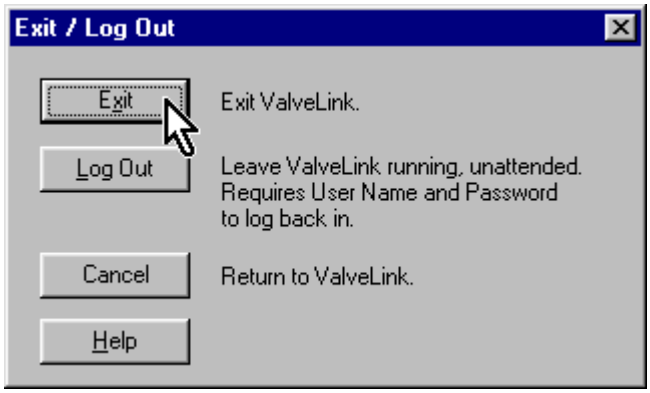


Figure 2-17. Exit ValveLink

Click the Exit button to exit ValveLink software.

Step 8: Restart ValveLink Software and Log In as a New User

Figure 2-18. Logging In

Click the Log In button.

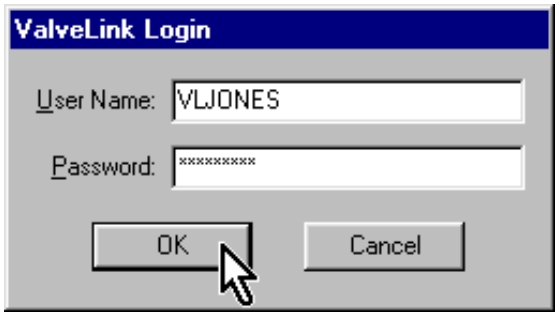


Figure 2-19. OK for Login Button

Enter your user name and password. Click OK.

Step 9: After NI-FBUS completes start up, double click the instrument icon to open its tag for the status monitor.

If a ⊘ appears over the instrument symbol ValveLink Solo is not connected to the instrument. A possible reason for not connecting may be that the instrument is at a temporary address. ValveLink Solo will not connect to an instrument at a temporary address.

If the instrument is at a temporary address, the Temporary Address window shown in figure 2-20 appears when you attempt to open the instrument tag. To change the device tag and address, click the Change Address button.

On the Change Device Tag and Address window, shown in figure 2-21, enter a working address for the device. Address 35 is

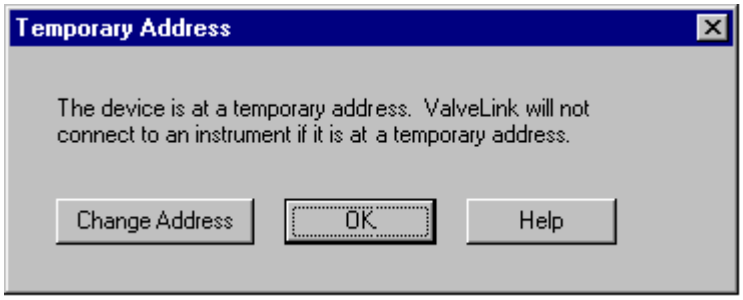


*Figure 2-20. Digital Valve Controller at a Temporary Address. Click **Change Address** to change the Device Tag and Address*

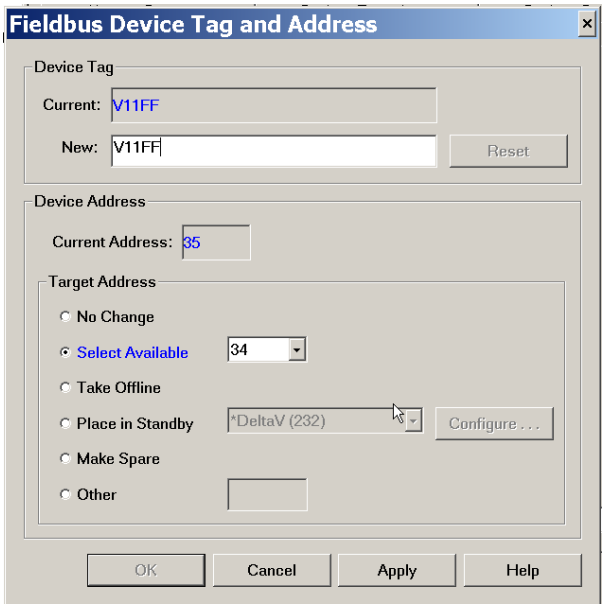


Figure 2-21. Changing the Device Address

preferred. However, if you are connected to an H1 segment, address 35 may be in use by another device. Select an unused address between 21 and 35. Click Set Address then click the Change Address button to assign the new address. When the address

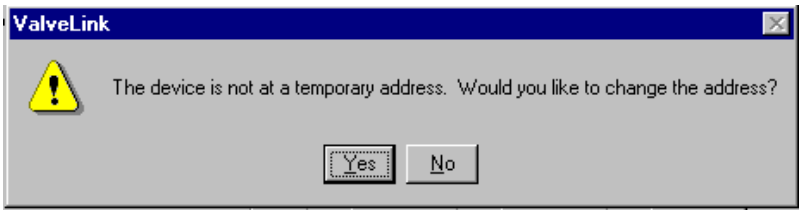


Figure 2-22. Reminder of Instrument Address Change

changes, click the Done button. The instrument should be connected and you may proceed with instrument startup, calibration, and diagnostics.

When you attempt to log out or exit ValveLink Solo, if the instrument was at a temporary address when you started, the message shown in figure 2-22 appears. You may leave the instrument at the set address or allow it to return to the temporary address. Click No to keep the set address or Yes to return to a temporary address.

Step 10: Click the Start Monitoring button to begin monitoring instrument and valve parameters

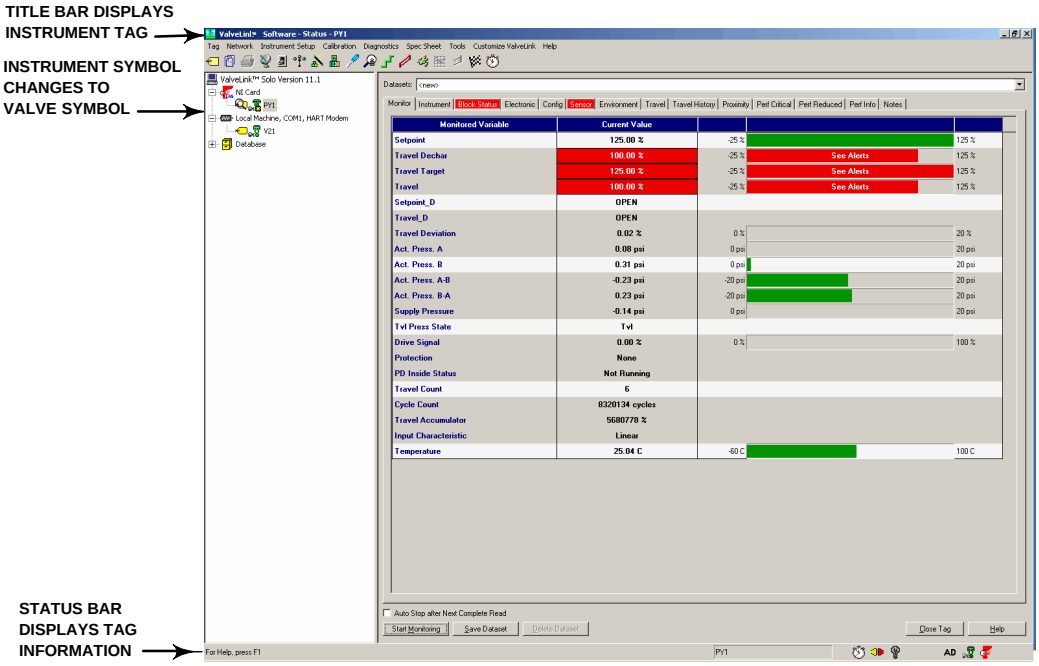


Figure 2-23. Start Monitoring

Section 3

Quick Start for AMS ValveLink SNAP-ON

This section contains quick start information for AMS ValveLink SNAP-ON. For more information on using AMS ValveLink SNAP-ON see ValveLink software help. Section 7 of this document provides information on ValveLink software help. For more information on using AMS Suite: Intelligent Device Manager, see the associated help.

Note

This section assumes AMS Device Manager and AMS ValveLink SNAP-ON are installed. See AMS Device Manager documentation for installation information. The ValveLink Software Installation Guide, found on the ValveLink software installation CD, gives detailed installation information for installing the AMS ValveLink SNAP-ON.

CAUTION

Do not run ValveLink Solo at the same time you are using AMS Device Manager or AMS Device Manager with AMS ValveLink SNAP-ON.

Note

To successfully use AMS ValveLink SNAP-ON, you must be familiar with using AMS Device Manager.

Step 1: Start AMS

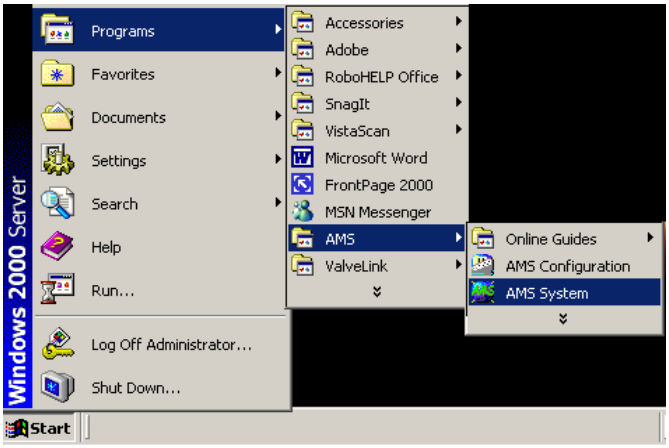


Figure 3-1. Enter the AMS System

Click a desktop icon or select AMS Device Manager from the Programs>AMS menu.

Step 2: Log in to AMS Device Manager

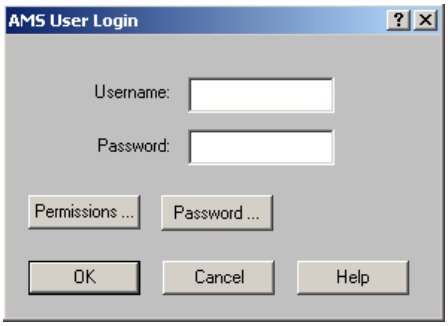


Figure 3-2. Login to the AMS System

In the AMS User Login window, enter the correct Username and Password. Click OK to continue.

Continue on with Step 3 to select a HART device. Go to Step 5 to select a fieldbus device.

Step 3: Select a HART device

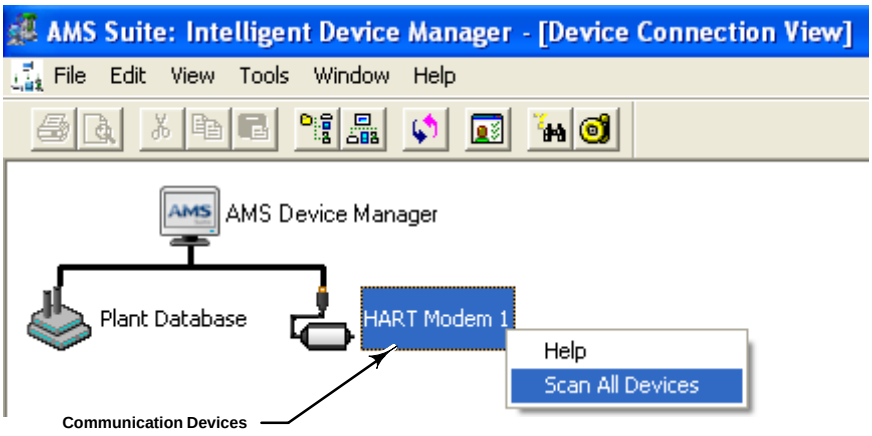


Figure 3-3. AMS Device Connection View (HART Device)

In the Device Connection View window, right click the communication devices (modem, multiplexer) icon and select Scan All Devices.

Step 4: Start AMS ValveLink SNAP-ON

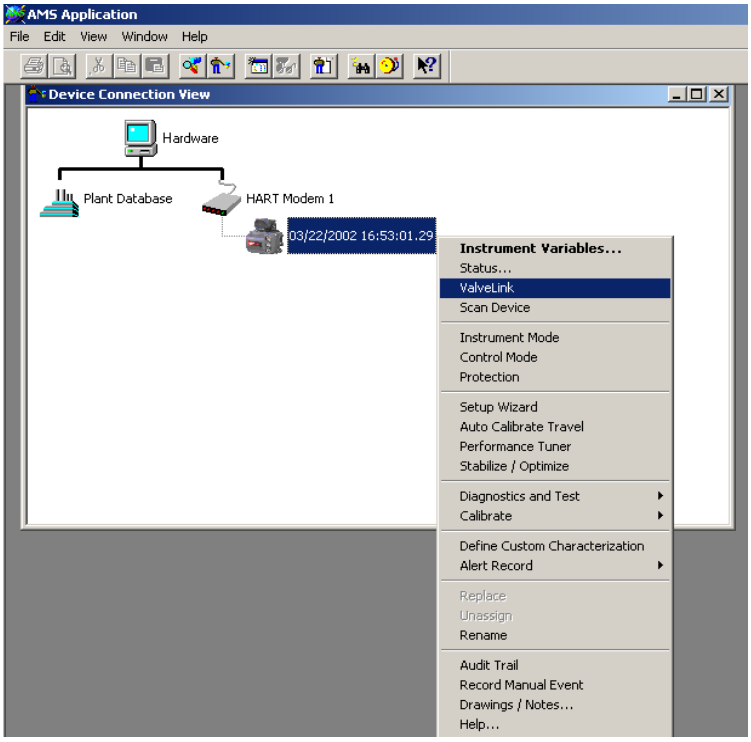


Figure 3-4. Starting AMS ValveLink SNAP-ON (HART Device)

Right click the instrument icon and select ValveLink from the context menu.

Step 5: Select a fieldbus device

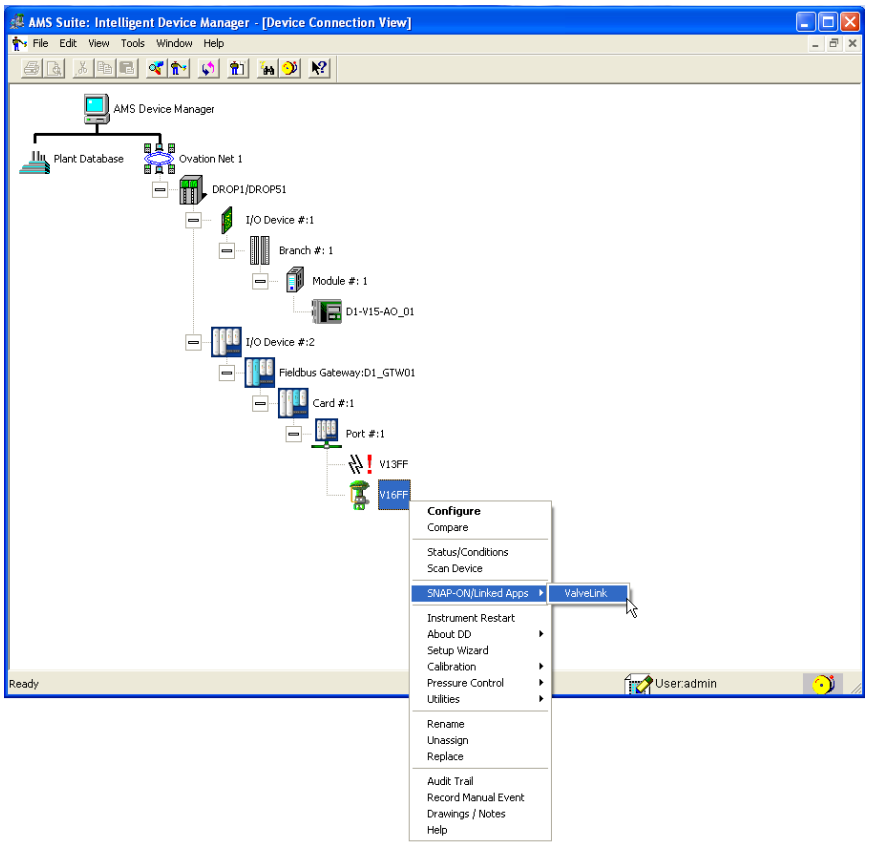


Figure 3-5. Starting AMS ValveLink SNAP-ON (fieldbus Device)

In the Device View Connection window, right click the instrument icon and select SNAP-ON/Linked Apps > ValveLink from the context menu as shown in figure 3-5.

Section 4

Quick Start for ValveLink DTM

This section contains quick start information for ValveLink DTM. For more information on using ValveLink DTM see ValveLink software help. Section 7 of this document provides information on ValveLink software help.

Note

This section assumes ValveLink DTM is installed. The ValveLink Software Installation Guide, found on the ValveLink software installation CD, provides detailed installation information.

Note

To successfully use the ValveLink DTM, you must be familiar with using the FDT frame application used to launch the ValveLink DTM. The information found in this section covers one example. Refer to the users guide for the FDT frame application that the ValveLink DTM is installed with for additional information.

Step 1: Start the FDT frame application.

Step 2: Select Add Device, as shown in figure 4-1, and click on the appropriate CommDTM. Select OK.

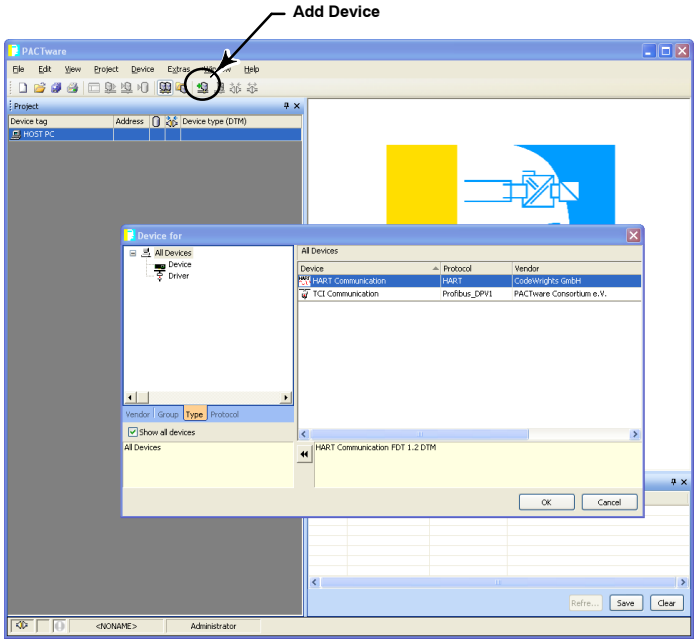


Figure 4-1. Select Add Device to Add the CommDTM

Step 3: With the CommDTM highlighted, select Add Device, as shown in figure 4-2, and click on the appropriate Device DTM. Select OK.

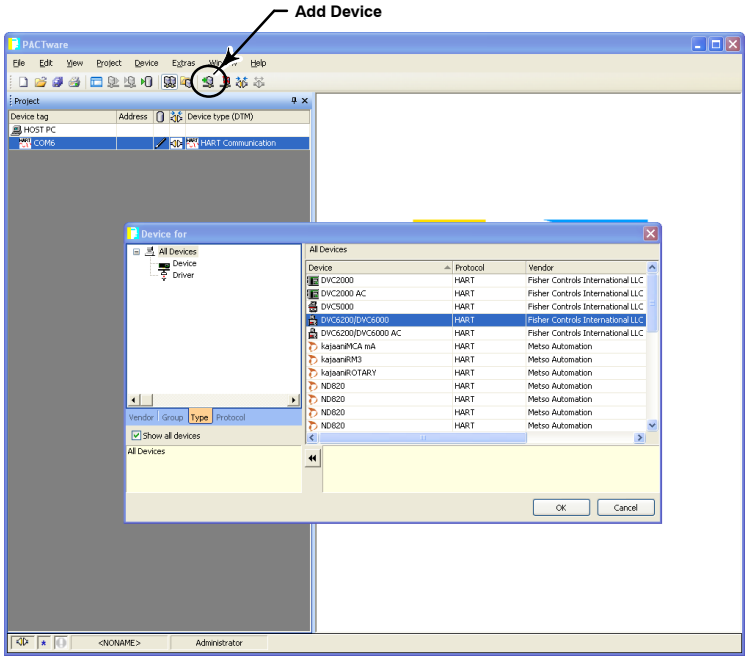


Figure 4-2. Select the DeviceDTM

Step 4: Set the appropriate settings for the CommDTM and DeviceDTM (see figure 4-3 and 4-4).

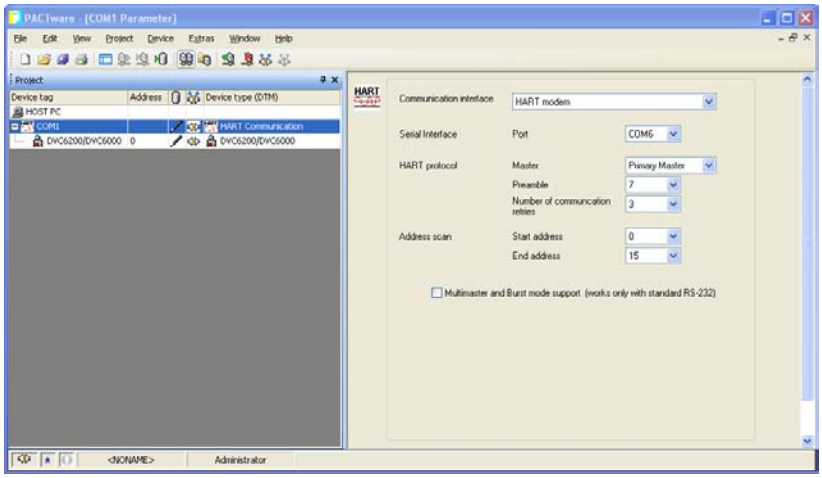


Figure 4-3. Setting the CommDTM

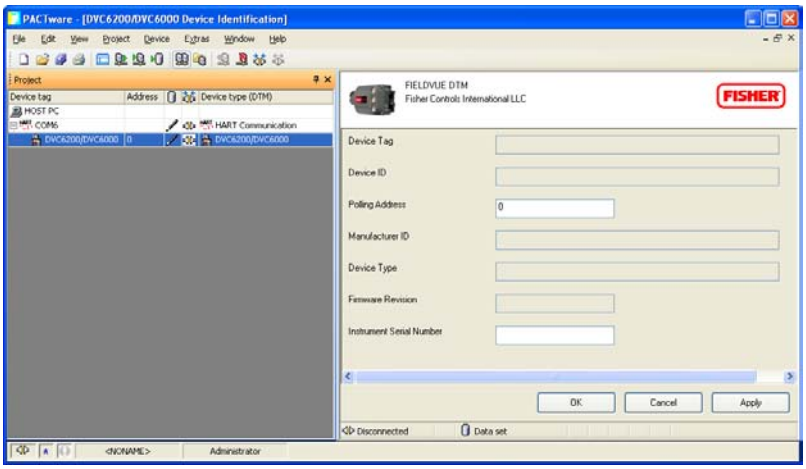


Figure 4-4. Setting the DeviceDTM

Step 5: With the DeviceDTM highlighted, select Connect as shown in figure 4-5.

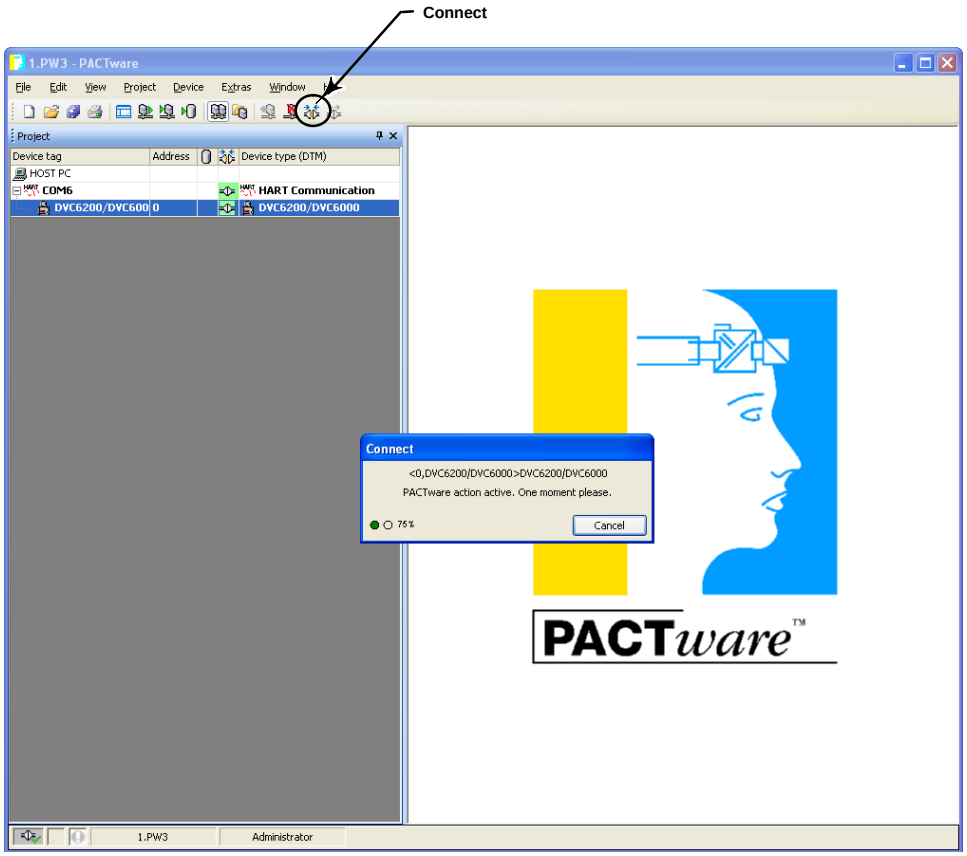


Figure 4-5. Connect the DeviceDTM

Step 6: Once connected, select ValveLink DTM as shown in figure 4-6.

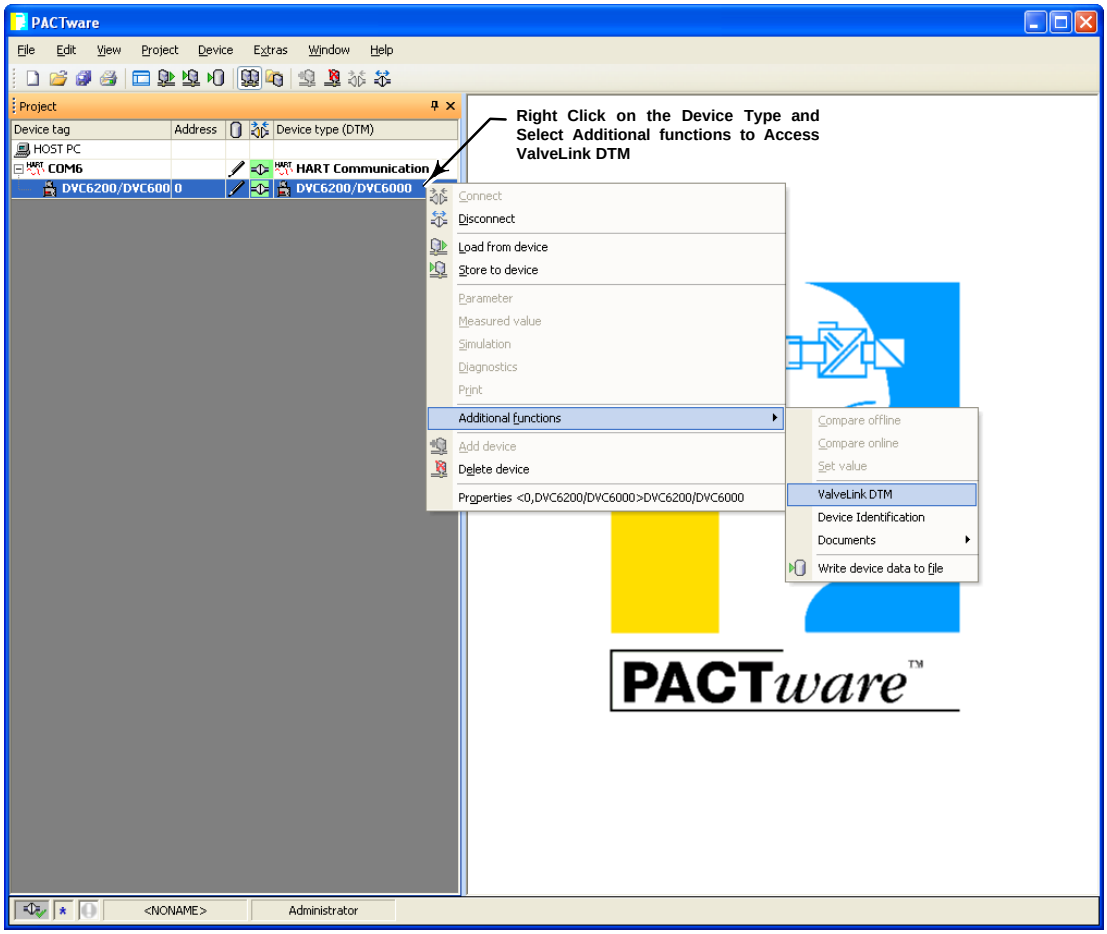


Figure 4-6. Select ValveLink DTM

Step 7: The ValveLink DTM will launch in a new window. All devices currently connected in the FDT frame application will show in the tree menu to the left of the ValveLink DTM window, as shown in figure 4-7. Double-click the device to open the device tag.

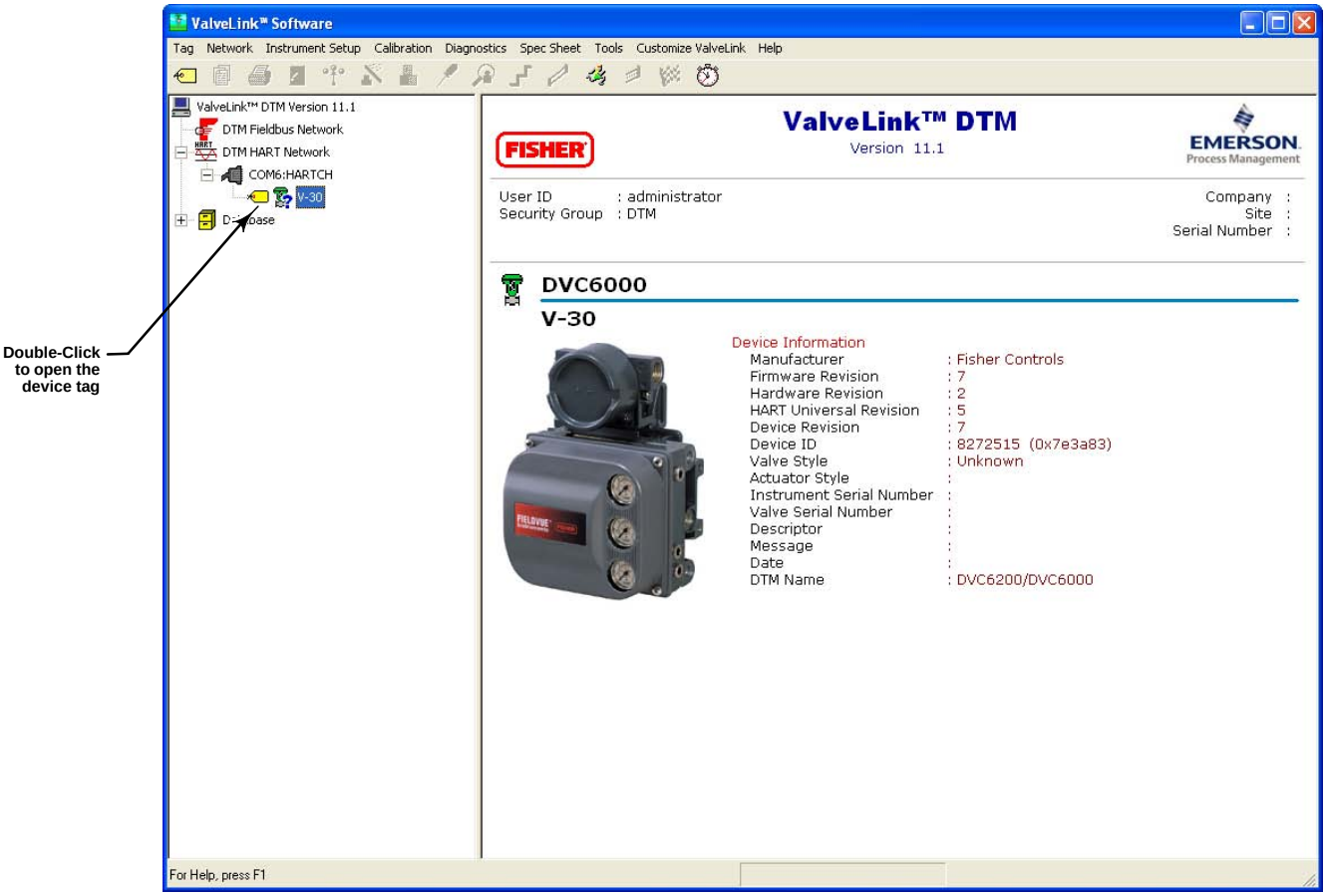


Figure 4-7. ValveLink DTM

Section 5

Quick Start for ValveLink PLUG-IN for PRM

This section contains quick start information for ValveLink PLUG-IN for PRM. For more information on using ValveLink PLUG-IN for PRM, see ValveLink software help. Section 7 of this document provides information on ValveLink software help.

Note

This section assumes ValveLink PLUG-IN for PRM is installed. The ValveLink Software Installation Guide, found on the ValveLink software installation CD, provides detailed installation information.

Note

To successfully use ValveLink PLUG-IN for PRM, you must be familiar with using PRM software.

Step 1: Run the PRM application.

Step 2: Select a Fisher fieldbus digital valve controller from the PRM system.

Step 3: Click on the PLUG-IN tab. Move the mouse cursor to the white list box, as shown in figure 5-1 and right-click. Select the Insert Control + Ins option.

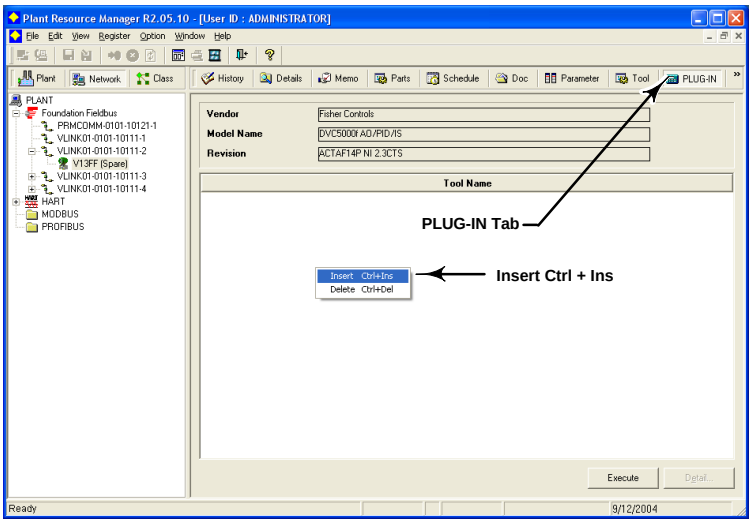


Figure 5-1. PLUG-IN Tab

Step 4: Select ValveLink PLUG-IN Launcher from the Tool Name dialog box and click on the OK button.

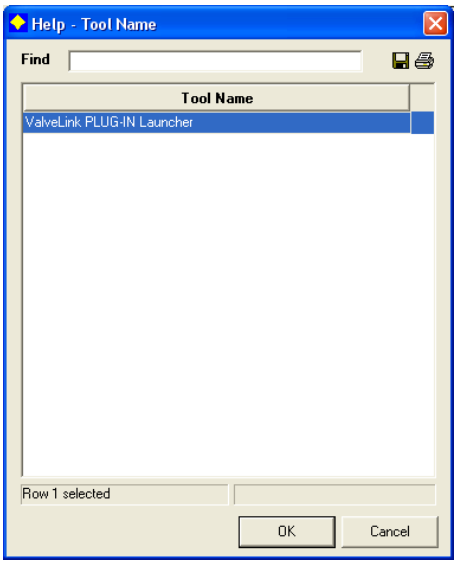


Figure 5-2. Tool Name Dialog Box

Step 5: Select ValveLink PLUG-IN Launcher and click on execute to start ValveLink PLUG-IN for PRM.

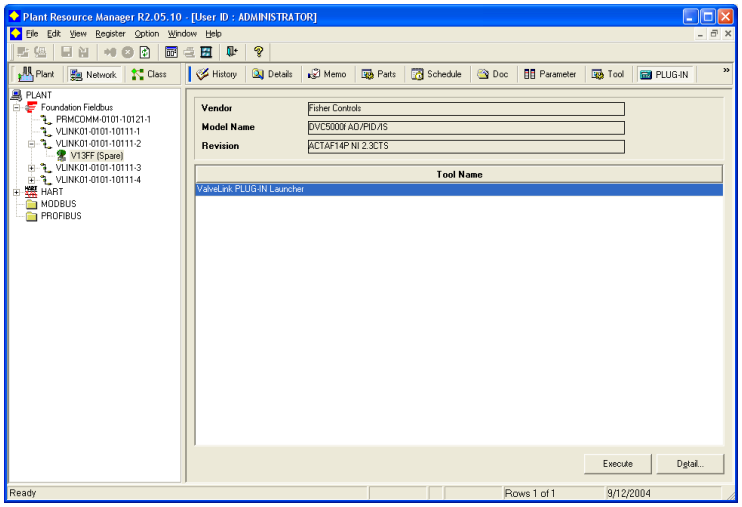


Figure 5-3. Starting ValveLink PLUG-IN Launcher

Section 6

ValveLink Software Buttons and Icons

This section describes the buttons and icons available on the ValveLink software toolbar and tree views.

Tool Bar Buttons

Toolbar buttons are shortcuts to ValveLink software commands.

Tag Button—Opens the Tag Management window for locating a specific tag. From the Tag Management window you can open, modify, copy, or delete a selected tag. You can also print a report containing information from the listed tags.

Dataset Report Button—Create a report containing the currently open dataset.

Print Button—Prints information from the active window.

Network Scan Button—Opens the Network Alert Scan window and allows you to scan selected tags. Using the Setup button you can select which tags to scan and which alerts to scan for. Network Scan is only available on ValveLink software setup to communicate through HART multiplexers.

Instrument Mode Button—For DVC5000, DVC6000, DVC2000, and DVC6200 instruments, allows changing the instrument mode between In Service and Out of Service. For DVC5000f, DVC6000f, and DVC6200f instruments, allows changing the Analog Output block, Resource block, and Transducer block target mode to another of the permitted modes. A mode of Out of Service may be required to change a setup parameter, or to run a calibration procedure or diagnostic test.

Control Mode Button—For DVC5000, DVC6000, DVC2000, and DVC6200 instruments only. Changes the instrument control mode between Analog and Digital. Control mode defines where the instrument reads its set point. Choose Analog if the instrument is to receive its set point over the 4−20 mA loop. Choose Digital if the instrument is to receive its set point digitally via the HART communications link.

Setup Wizard Button—Starts the Setup Wizard to permit automatic setup and travel calibration of the instrument using specified actuator information.

Detailed Setup Button—Opens the Detailed Setup window for the open tag. Provides options for defining an instrument's operating parameters. You can retrieve information from the ValveLink software database or from the instrument. You can also modify this data and save changes in the database or download them to the instrument.

Calibration Button—Opens the Auto Travel Calibration window for the open tag. Available only on software with calibration enabled. See the ValveLink software Help screen, About ValveLink, to see if calibration is enabled.

Instrument Status Button—Displays the Instrument Status window for the open tag. Provides device monitor, alert, and device information for an open tag.

Step Response Button—Opens the Step Response window for the open tag. Plots TRAVEL versus the TIME it takes to move the valve through the specified steps. Available only on software with step response enabled. See the ValveLink software Help screen, About ValveLink, to see if step response is enabled.

Dynamic Scan Button—For HART and fieldbus instruments, sets variables for running diagnostic tests, including input start and input end percentages and Scan time.

Batch Runner Button—Opens the Batch Runner dialog box to permit defining a batch process. With Batch Runner you can automate a user-selected group of operations to run on one or more instruments. Available only on software with batch runner enabled. See the ValveLink software help screen, About ValveLink, to see if Batch Runner is enabled.

Trending Button—For DVC5000, DVC6000, DVC2000, and DVC6200f instruments only. Displays operating parameter trends as they occur (live data), a parameter trend history (trend archive), and a valve travel histogram. Trend is set up from the Network Alert Scan window. Available only on software with trending enabled. See the ValveLink software Help screen, About ValveLink, to see if trending is enabled.

Partial Stroke Ramp—For DVC6000 SIS and ODV instruments and DVC6200 ODV instruments. Opens the tabbed pages for the partial stroke test for the unique conditions of a Safety Instrumented System (SIS) application.

Performance Diagnostics—Opens the tabbed pages for Performance Diagnostics. Available only on software with performance diagnostics enabled. See the ValveLink software Help screen, About ValveLink, to see if performance diagnostics is enabled.

Scheduler—Opens the Scheduler window. Scheduler allows you to run various types of tests at predefined intervals without user intervention. The resulting data is available for later viewing and analysis. Scheduler is only available for ValveLink software installations on which Batch Runner is licensed.

Treeview Icons

Valve icons on the device tree indicate the instrument service mode of the associated physical device.

There are three modes which are reflected in the treeview icons. Travel Control, Pressure Control and SIS. If the instrument is in Travel Control, all icons associated with it will be green. Pressure Control is indicated by blue icons, and SIS is indicated by orange icons. The following treeview icons are seen in each of the control modes.

Sliding Stem/Spring and Diaphragm Actuator - In Service—Indicates that a sliding stem valve and a spring and diaphragm actuator are currently in service.

Sliding Stem Valve/Piston Actuator - In Service—Indicates that a sliding stem valve and a piston actuator are currently in service.

Rotary Valve / Spring and Diaphragm Actuator - In Service— Indicates that a rotary valve and a spring and diaphragm actuator are currently in service.

Rotary Valve / Piston Actuator - In Service— Indicates that a rotary valve and a piston actuator are currently in service.

Out of Service—A bold yellow-on-black X over the lower right portion of the valve image indicates that the device is out of service.

Communications Problem—A red X over the lower right portion of the valve image indicates that an error has occurred during the last communication attempt with the device. Check the communications log and troubleshoot the problem.

Unknown Instrument Mode—A blue question mark over the lower right portion of the valve image indicates ValveLink has not yet read the instrument mode, and it is considered to be unknown.

Scheduled Task Running—A valve image with a stopwatch indicates that ValveLink is currently running a scheduled task with this device.

Section 7

ValveLink Software Help

This section describes ValveLink software help. The help system provides step-by-step procedures for working with ValveLink software features. For every ValveLink software window, the help system defines edit fields, parameters, and buttons. The Glossary provides quick pop-up definitions.

Accessing Help

To access help you can:

Click the Help button on any window,

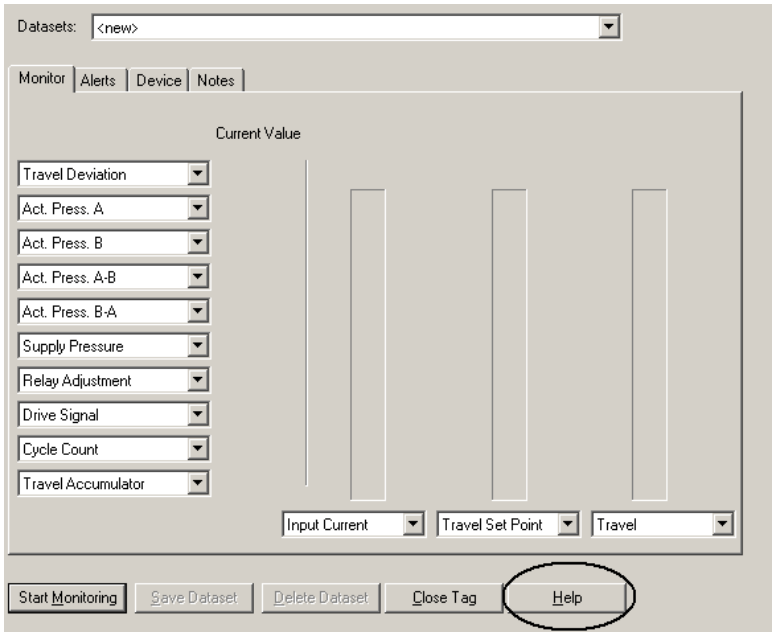


Figure 7-1. Help Button

select an option from the Help menu,

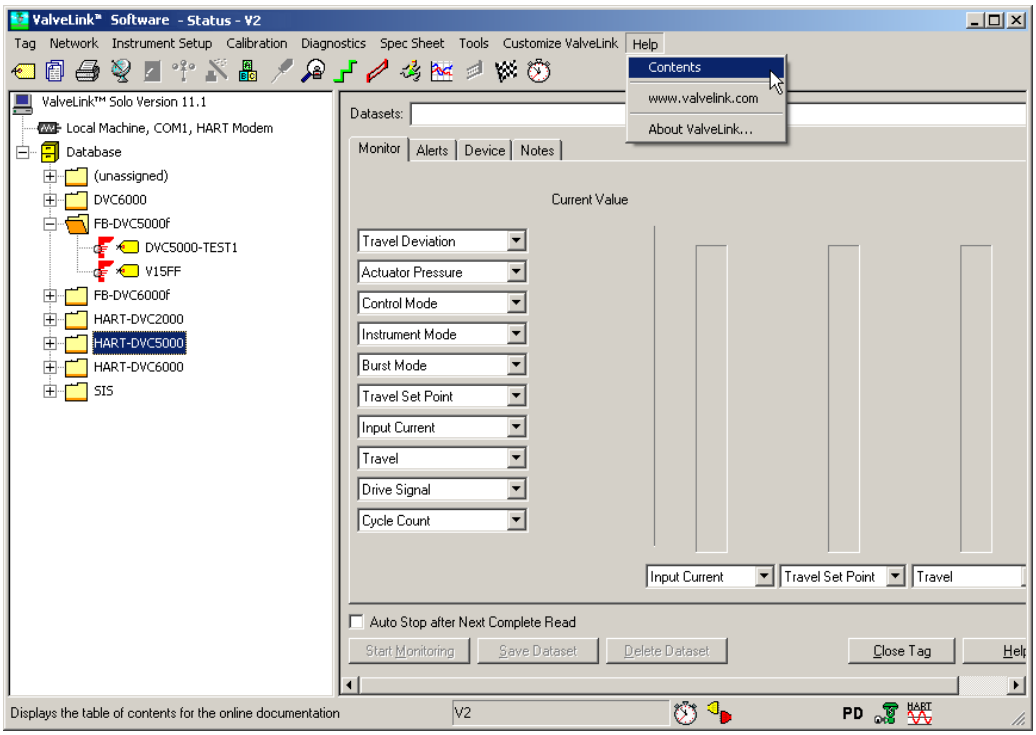


Figure 7-2. Help Options

or press F1.

Using the Glossary

When you need a quick definition of a term, an edit field, or instrument parameter, use the Glossary.

Step 1: Access ValveLink help by selecting Contents from the Help menu

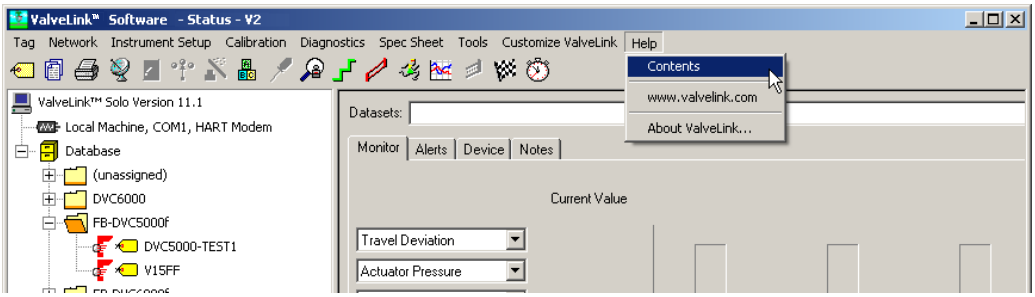


Figure 7-3. Help Menu

Step 2: **Click Glossary button in the Contents tab**

Step 3: **Click an alphabetic button to narrow your search**

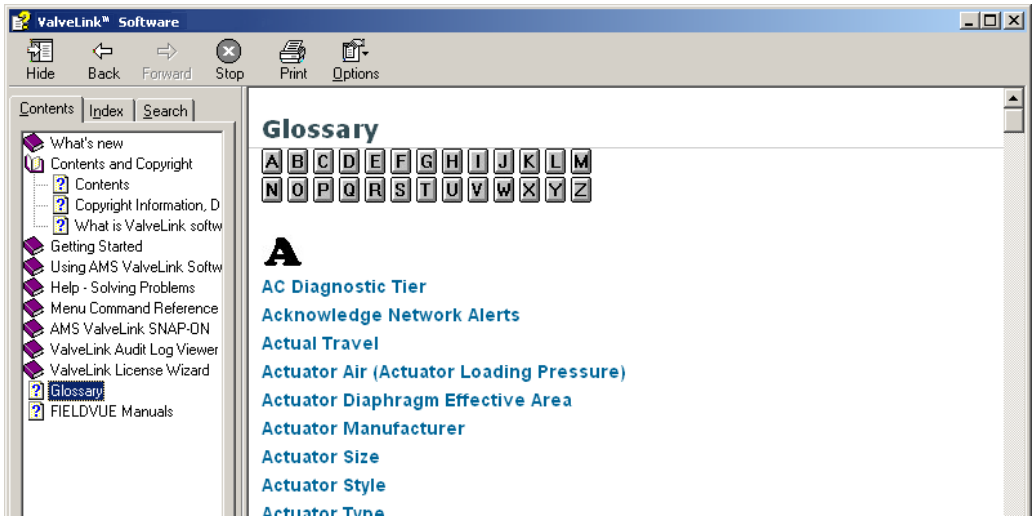


Figure 7-4. Alphabetic Buttons

Step 4: **Scroll through the terms listed until you find the word you're looking for**

Step 5: **Click the term to open a pop-up definition**

Step 6: **Click again to close the pop-up definition**

Finding Help Topics

For detailed information about a particular topic, you can:

Select a Topic from the Help Contents

The Contents are similar to the table of contents in a paper manual. Find an entry that interests you then click its title.

Figure 7-5. Help Contents

For information, contact your local Emerson Process Management sales office or local business partner. Visit www.Fisher.com

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