SIEMENS

Providing user-defined documentation

Function Manual

Legal information

Warning notice system

This manual contains notices you have to observe in order to ensure your personal safety, as well as to prevent damage to property. The notices referring to your personal safety are highlighted in the manual by a safety alert symbol, notices referring only to property damage have no safety alert symbol. These notices shown below are graded according to the degree of danger.

> ⚠️ **DANGER**
>
> indicates that death or severe personal injury **will** result if proper precautions are not taken.

> ⚠️ **WARNING**
>
> indicates that death or severe personal injury **may** result if proper precautions are not taken.

> ⚠️ **CAUTION**
>
> indicates that minor personal injury can result if proper precautions are not taken.

> **NOTICE**
>
> indicates that property damage can result if proper precautions are not taken.

If more than one degree of danger is present, the warning notice representing the highest degree of danger will be used. A notice warning of injury to persons with a safety alert symbol may also include a warning relating to property damage.

Qualified Personnel

The product/system described in this documentation may be operated only by **personnel qualified** for the specific task in accordance with the relevant documentation, in particular its warning notices and safety instructions. Qualified personnel are those who, based on their training and experience, are capable of identifying risks and avoiding potential hazards when working with these products/systems.

Proper use of Siemens products

Note the following:

> ⚠️ **WARNING**
>
> Siemens products may only be used for the applications described in the catalog and in the relevant technical documentation. If products and components from other manufacturers are used, these must be recommended or approved by Siemens. Proper transport, storage, installation, assembly, commissioning, operation and maintenance are required to ensure that the products operate safely and without any problems. The permissible ambient conditions must be complied with. The information in the relevant documentation must be observed.

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We have reviewed the contents of this publication to ensure consistency with the hardware and software described. Since variance cannot be precluded entirely, we cannot guarantee full consistency. However, the information in this publication is reviewed regularly and any necessary corrections are included in subsequent editions.

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Using user-defined documentation
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User-defined documentation for project or library contents

Over time, you create your own contents in a project or a library. Your own contents include, for example, blocks, tags or library types. While the operating principle of the TIA Portal is described in the supplied help system, there is no help for the contents you have created yourself. You can create your own user-defined documentation to explain to other employees how your project works or how to use individual library types.

You can provide user-defined documentation in the available user interface languages. The default user interface languages in the TIA Portal are German, English, French, Spanish, Italian and Chinese. You need to observe a few conventions when you create user-defined documentation so that the help matching an object can be opened.

You create the user-defined documentation either in one of the supported Office formats or as compiled HTML help in CHM format.

Possible areas for user-defined documentation

You can offer user-defined documentation in the following areas of the TIA Portal, for example:

* Project tree
* "Libraries" task card and library view
* Some editors, depending on the products installed, for example:
  - Program editor

    The programming languages LAD, FBD, STL, SCL and GRAPH are supported. Block calls also support the connection of user-defined documentation.
  - "Screens" editor

    Uses of screens and instances of HMI faceplates are supported in the "Screens" editor.

Storage locations for user-defined documentation

Save the user-defined documentation in one of the following directories:

- Project folder

  If you create user-defined documentation for objects within a project, save this help in the project folder. The user-defined documentation is also included when you pass on the project.

- Directory of a global library

  If you create user-defined documentation for objects within a global library, save the user-defined documentation in the directory of the global library. The user-defined documentation is also included when you pass on the global library.

- Central directory on the hard drive or a network drive

  You can store the user-defined documentation in a central directory on the hard disk or on a network drive. In this way, you have access to the user-defined documentation in each project or you use the documentation on a network drive together in the team. You specify the central storage directory for the user-defined documentation using an XML configuration file.

Homepage for the user-defined documentation

You can create a separate homepage for each language version of the user-defined documentation. The homepage for the user-defined documentation can contain general help for a project or for a library. The homepage must be saved in the central storage directory for user-defined documentation.

Calling the user-defined documentation

If you open the help for an object with <Shift+F1>, the user-defined documentation will be opened with priority, provided this is available. The user-defined documentation is always opened with the standard program specified for the respective file format in Microsoft Windows.

You can display a call log for the user-defined documentation for easier connection of the user-defined documentation. The alarms within the log show you which directories are searched for help and whether the call of the user-defined documentation is successful. You also see the file name that is expected for the help file. This allows you to identify how you need to name your help and in which directories you must store the user-defined documentation. The call log has the same sequence as the one used to search for user-defined documentation or a homepage.

The log is displayed in the Inspector window in the "Info" tab. Before you can display the call log, you must first activate the call log with the help of an XML configuration file

Below, you will see the structure of the call log and the sequence in which the individual directories are searched for user-defined documentation:

▼ Object name and object category of the currently selected object.

    ▼ Currently set language of the user interface

        CHM file in the central directory for user-defined documentation

        Other user-defined documentation in the central directory for user-defined documentation

        CHM file within the project or library directory

        Other user-defined documentation within the project or library directory

    ▼ English user-defined documentation, if no user-defined documentation is available in the currently set language

        CHM file in the central directory for user-defined documentation

        Other user-defined documentation in the central directory for user-defined documentation

        CHM file within the project or library directory

        Other user-defined documentation within the project or library directory

As soon as user-defined documentation is found in one location, the user-defined documentation is opened and the search is canceled. If user-defined documentation cannot be found in any of the directories, the central storage directory is searched for a homepage. The search for a homepage starts in the currently set language and continues in the English language directory. If neither user-defined documentation nor a homepage is found, the supplied help system of the TIA Portal opens.

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Specifying settings

2

You make settings for the user-defined documentation in a configuration file in XML format. The XML configuration file is the same file you use for the integration of company libraries. You can set the following options in the XML configuration file:

● Activate access log

● Activate search for user-defined documentation in a central storage location

● Specify central directory for user-defined documentation

Procedure

To specify settings for the user-defined documentation, follow these steps:

1. Create an XML file named "CorporateSettings.xml", if you are not yet using an XML configuration file for the integration of company libraries. If you are already using a configuration file, proceed with step 3.

   The configuration file must be saved with "UTF-8" coding.

2. Save the file in the following directory on your computer:

   C:\ProgramData\Siemens\Automation\Portal V13\CorporateSettings\

3. Enter the content listed below into the XML configuration file.

4. Adapt the attributes for display of the user-defined documentation. The meaning of the individual elements is available in the comments in the XML configuration file. Use the value "true" to activate a function. Use the value "false" to deactivate a function.

Content of the XML configuration file

The XML configuration file must have the following content:

XML

```
<?xml version="1.0" encoding="utf-8"?>
<Document>
 <Settings.Settings ID="0">
  <ObjectList>
   <Settings.General ID="1" AggregationName="General">
    <!-- Here you find the settings for global company libraries, if available. -->
    <ObjectList>
     <Settings.UserDocumentation ID="2" AggregationeName="UserDocumentation">
      <!-- In the following section, you specify the values for display of the user-
       defined documentation. -->
      <AttributeList>
       <!-- Activates or deactivates the display of the access log. -->
       <DisplayLogInformation>
        <Value>true</Value>
       </DisplayLogInformation>
       <!-- Activates or deactivates the search for user-defined documentation in a
        central directory. -->
       <EnableLookupFromCentralStorageLocation>
        <Value>true</Value>
       </EnableLookupFromCentralStorageLocation>
       <!-- Specifies the central directory for user-defined documentation. -->
       <CentralStorageLocation>
        <Value>D:\CorporateDocumentation\UserDocumentation\</Value>
       </CentralStorageLocation>
      </AttributeList>
     </Settings.UserDocumentation>
    </ObjectList>
   </Settings.General>
  </ObjectList>
 </Settings.Settings>
</Document>
```

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Creating a homepage

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You can design a homepage for user-defined documentation. The homepage can be an HTML page that you save either within a CHM or in the directory of the respective language. You can also use other file formats approved for user-defined documentation. You design the homepage of the user-defined documentation outside the TIA Portal.

Procedure

To create a homepage, follow these steps:

1. Design a file in HTML format or in any other file format approved for user-defined help.

2. Name the file "Home".

3. Copy the file to the central directory for user-defined documentation on the hard disk or on a network drive:

   <Central directory for user-defined documentation>\<Folder for the respective language>

4. If the respective language folder does not exist yet, create the folder now.

   Alternative: If you are creating the homepage for a CHM file, place the homepage in the main directory of the CHM file.

Sample configuration for the homepage

Below you see the correct path for the following conditions:

* The user-defined documentation is in Spanish.

* The homepage is an HTML file.

The path for these conditions is as follows:

<Central directory for user-defined documentation>\es-ES\Home.html

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Conventions for the creation

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You must observe some conventions to ensure that user-defined documentation is called at the correct location:

- the user-defined documentation must be saved in the correct directory.
- The file name must be exactly the same as the object name in the TIA Portal.

To prevent malicious code from being executed on your computer, only file formats that are considered as relatively safe are permitted.

Supported file formats

Create the user-defined documentation in one of the following file formats:

- Microsoft Word (.docx)
- Microsoft Excel (.xslx)
- Microsoft PowerPoint (.pptx and .ppsx)
- HTML pages (.htm or .html)
- Microsoft XPS (.xps)
- Rich Text Format (.rtf)
- Text documents (.txt)
- Compiled HTML help (.chm)

You save the homepage of the user-defined documentation in HTML format or save the homepage within a CHM file.

NOTICE
Infection of the computer with malicious code
If the user-defined documentation contains malicious code, it can infect your computer. Especially HTML pages and CHM files can contain malicious code.
Make sure that the user-defined documentation comes from a trustworthy source. You should also use the standard security measures, such as the use of a firewall and an up-to-date virus scanner.

Directories for user-defined documentation

Save the user-defined documentation in one of the following directories:

- Project folder:

  UserFiles\UserDocumentation\<Folder for the respective language>\<Object category>

- Directory of a global library:

  UserFiles\UserDocumentation\<Folder for the respective language>\<Object category>

- Central directory on the hard drive or a network drive:

  <Central directory for user-defined documentation>\<Folder for the respective language>\<Object category>\

The user-defined documentation must be located in the suitable subfolder for the respective language. The table below shows the respective language folders for the user languages installed as default:

Language	Subfolder
German	\de-DE
English	\en-US
Spanish	\es-ES
French	\fr-FR
Italian	\it-IT
Chinese	\zh-CN

The language folder must contain a separate subfolder for each object category. Create the corresponding subfolders for objects for which you are providing user-defined documentation. Always use the English designation of the object category. The table below shows the English designations of the most important object categories in the TIA Portal:

Object category	English designation
HMI screens	Screens
Organization blocks (OB)	Organization Blocks
Function blocks (FBs)	Function Blocks
Functions (FCs)	Functions
Data blocks	Data Blocks
Types in the library	Library Types
Master copies in the library	Master Copies
The project node in the project tree	Projects
All types of folders in the project tree, in the project library or in global libraries	Folders
All types of links in the project tree, for example, "Add new block", "Add new device", etc.	ShortCut
Libraries in the "Libraries" task card or in the library view	Libraries

If you are not sure of the English designation for an object category, change the user interface language of the TIA Portal to English. Alternatively, open the user-defined documentation for an object with <Shift+F1> and check in the call log which designation is expected for the object category.

Permitted file names

The file name must be exactly the same as the object name in the TIA Portal.

There are, however, restrictions for file names under Microsoft Windows. The same restrictions apply to the file system used to format the hard drive. The file name may only include certain characters and must not exceed a specific length. The restrictions for file names differ depending on the Windows version and the file system used for the hard drive.

To ensure that the help call works, read up on possible restrictions in the Microsoft Windows documentation.

Special features of CHM files

You store CHM files directly in the respective language folder. The folder for the respective object category must be included in the actual CHM file. Within the compiled CHM file, the names of the individual HTML files must be exactly the same as the name of the object in the TIA Portal.

Note

Opening CHM files on network drives

If CHM files are saved on a network drive, the CHM files are not displayed correctly in more recent versions of Microsoft Windows. This behavior is determined by the security guidelines of the operating system. All versions of Microsoft Windows as of Windows Server 2003 SP1 are affected.

You can bypass the security guidelines by changing the registry database in Microsoft Windows.

To not compromise the security of your computer, save the CHM files only locally on your computer and do not change the registry database.

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Calling user-defined documentation

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The user-defined documentation is opened in the language that is currently set as the user interface language. If there is no user-defined documentation available in the currently set user interface language, the English version of the user-defined documentation opens. If no user-defined documentation exists, an attempt is made to open a homepage for user-defined documentation. If no user-created documentation contents created are found, the supplied help system of the TIA Portal opens.

Requirements

You have already saved user-defined documentation or a homepage according to the conventions.

Procedure

To open the user-defined documentation, follow these steps:

1. Select the object for which you want to display the user-defined documentation.
2. Press <Shift+F1>.

   The suitable user-defined documentation or the homepage opens.

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Displaying the call log

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Use the call log to check whether the user-defined documentation is connected correctly. The call log shows the directories in which the search is performed for user-defined documentation or a homepage. The call log also displays the names that the individual files must have in order to call the user-defined documentation.

Requirements

The call log is activated with the help of an XML configuration file.

Procedure

To display the call log, follow these steps:

1. Open the "Info" tab in the Inspector window.
2. Open the "General" tab.
3. Select the object for which you want to call the help.
4. Press <Shift+F1>.

   If possible, the matching user-defined documentation or the homepage of the user-defined documentation is opened. In any case, you will be informed in the Inspector window about which user-defined documentation is opened. You may be shown the directories in which no user-defined documentation was found.

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User-defined documentation for individual elements within a project or a global library is created outside the TIA Portal. You can create the user-defined documentation in all available user interface languages.

If you create the user-defined documentation as CHM file, the procedure for creating the help is somewhat different to the creation process for other file formats.

Note the information provided in chapter "Conventions for the creation (Page 13)".

Creating user-defined documentation as single file

To create user-defined documentation as a single file, follow these steps:

1. Create a file in a valid file format.

2. Name the file identically to the object for which you want to call the user-defined documentation.

   If you are offering help for a library type, for example, name the help file identical to the type.

3. Depending on whether you are creating the user-defined documentation for project contents or for contents of a global library, copy the file to one of the following storage locations:

   – project folder under "UserFiles\UserDocumentation\<Folder for the respective language>\<Object category>"

   – Directory of a global library under "UserFiles\UserDocumentation\<Folder for the respective language>\<Object category>"

   – Central directory on the hard drive or a network drive:

     <Central directory for user-defined documentation>\<Folder for the respective language>\<Object category>\

   If the respective language folder or the folder for the object category does not exist yet, create the required folders before copying the file.

Sample configuration for user-defined documentation

Below you see the correct path for the following conditions:

- The user-defined documentation is intended for a type in a global library.

- The user-defined documentation is in French.

- The type is called "commande de moteur".

- The user-defined documentation is supplied with the global library.

- The user-defined documentation is created in Microsoft PowerPoint format.

The path for these conditions is as follows:

<Folder of the global library>\UserFiles\UserDocumentation\fr-FR\Library Types\commande de moteur.pptx

Creating user-defined documentation as CHM file

To provide user-defined documentation in CHM format, follow these steps:

1. Create a folder in Windows Explorer for each object category for which you want to create user-defined documentation. Use the English designation for the object category.

2. Create an HTML file for each object for which you want to provide user-defined documentation. Name the HTML file identically to the object for which you want to call the user-defined documentation. If you want to provide user-defined documentation for a library type, for example, name the HTML file identically to the type.

3. Store the HTML files in the corresponding folders of the respective object category.

4. Use the Microsoft HTML Help Workshop to create the CHM. Use the prepared folder structure with the HTML files.

5. Copy the CHM file to one of the following storage locations:

   – Project folder under "UserFiles\UserDocumentation\<Folder for the respective language>"

   – Directory of a global library under "UserFiles\UserDocumentation\<Folder for the respective language>"

   – Central directory on the hard drive or a network drive:

     <Central directory for user-defined documentation>\<Folder for the respective language>

If the respective language folder does not exist yet, create the language folder before you copy the CHM file.

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