SIEMENS

for PSAIM™ version 1.4

EIMp User's Guide

Table of Contents

Contacting Customer Support

SIEMENS provides a dedicated technical support team for their Process Safety & Conceptual Engineering Software.

Customers that qualify for Customer Support Services are entitled to these services. For questions related to Customer Support and whether or not you qualify, please check with the support team for verification. The program includes the following services and is subject to a user registration procedure.

- Access to Technical Support Service (TSS): Customer Support for problems related to software use post installation
- Access to Technical Support Website (TSW): Web site including amongst others, information such as Frequently Asked Questions and technical documentation about products.
- Software Updates (SU): Request for shipment of software upgrades such as major and minor releases, and service packs (for qualifying customers and users)
- Software Installation (SI): Assistance with software installation

Technical Support Service (TSS)

TSS can be reached through the **Customer Care Center phone number:**.

International and within US: **+1 (800) 333-7421**

The phone is answered 24 x 7 x 365. However, response to service request tickets is provided only from Monday to Friday, business hours from 8:00 AM to 5:00 PM, Central Daylight Time, excluding US national holidays.

Technical Support Website (TSW)

Incidents reported prior to July 2015 (Rightnow Portal)

Access to **Rightnow Portal** through Operations Intelligence, Safety & Conceptual Engineering Services Customer Support Site (https://www.siemens.com/energy/sw-support) is available to all customers registered as a TSS user. TSW contains technical information such as Technical Documentation and Useful Hints.

Customers are requested to check the status of incidents reported prior to July 2015 in the Rightnow Portal. After July 2015, this portal will no longer accept new Incident Requests.

Incidents reported after July 2015 will be available in the SIOS portal below.

Incidents reported after July 2015 (SIOS Portal)

Access to Siemens Industry Online Support (SIOS) (https://support.industry.siemens.com/cs/#?lc=en-WW) is available to all registered users. User must be **registered** at the SIOS portal to be able to request service. User can register directly on the portal by clicking the above URL and then **clicking Register in the upper right portion of the page**. Note: The SIOS portal is the recommended means for requesting support.

All emails are handled directly in the support ticketing system via the web portal above and are linked to ticket numbers so a full record of all email communications is maintained

Problems Accessing TSW

In case customers are facing problems accessing the TSW, please call +1-800-333-7421

Software Update (SU)

Qualified customers can request for or be notified when major, minor releases, patches, service packs are available for valid and licensed versions of the software product. Alternatively, customers can contact a TSS representative using the Customer Care Center phone number provided above to receive these updates by logging a ticket.

Software Installation Service (SI)

Qualified customers can contact the TSS team via the customer support center to request assistance with installation of licensed software

Postal Mail

Siemens Energy, Inc.
Customer Services, Oil, Gas & Marine
Process Safety & Conceptual Engineering
Attn.: Customer Support Department
4615 Southwest Freeway, Suite 900
Houston, TX 77027
USA

About This Guide

This application includes complete documentation in an accessible PDF-based help system. The accessible PDF format is designed to provide easy navigation online. The file can also be printed out to provide a handy desktop reference.

Formatting Conventions

Style	Convention
Bold	Terms in bold describe an item that you select to carry out a given task.
	Example: Select the **Print** option.
Italics	Italicized terms pertain to the three (3) tabs of the Properties View.
	Example: Design specifications are edited in the *Engineering* tab.
Dotted Underline	Text with a dotted underline represent links to another topic within the document.
	Example: The model is illustrated in Figure 1-47.

In addition to these formatting conventions, this document uses the following styled paragraphs as visual cues for online viewing.

- **Notes** are used to offer information that supplement important points of the main text. Tips suggest certain techniques and procedures that may help you achieve your task quickly.

    Unit or Case is not required.

    You can install each PSAIM™ component separately. You simply uncheck the components you do not want to install.

    The service is typically installed on the same server.

- **See Also** notices provide you with additional references to similar topics and/or concepts within the guide as well as external sources.

    To continue with the Environment configuration and EIMp database upgrade, refer to the "PS Environment Tool Configuration Guide."

    To continue with the Environment configuration and EIMp database upgrade, refer to the "PS Environment Tool Configuration Guide."

    See the topic, *Troubleshooting the Configuration* for more information.

- **Web References** point you to external web sites that give additional information on the given topic.

    http://www.siemens.com/energy

- **Important** notices provide information that are required to completing a given task.

    Check-in all site-level items and approve the changes.

Due to limitations with SQL Server, you must install the PSAIM™ and EIMp databases on the **same system** where SQL Server is hosted.

- **Warnings** tell you that failure to take or avoid a certain action could result in loss of data or application malfunction.

Warning
Do not power off or unplug your machine during an upgrade.

1 Using EIMp

The EIMp (Engineering Information Management platform) is used for controlling user access and maintaining the plant topology (COMPANY/SITE/UNIT).
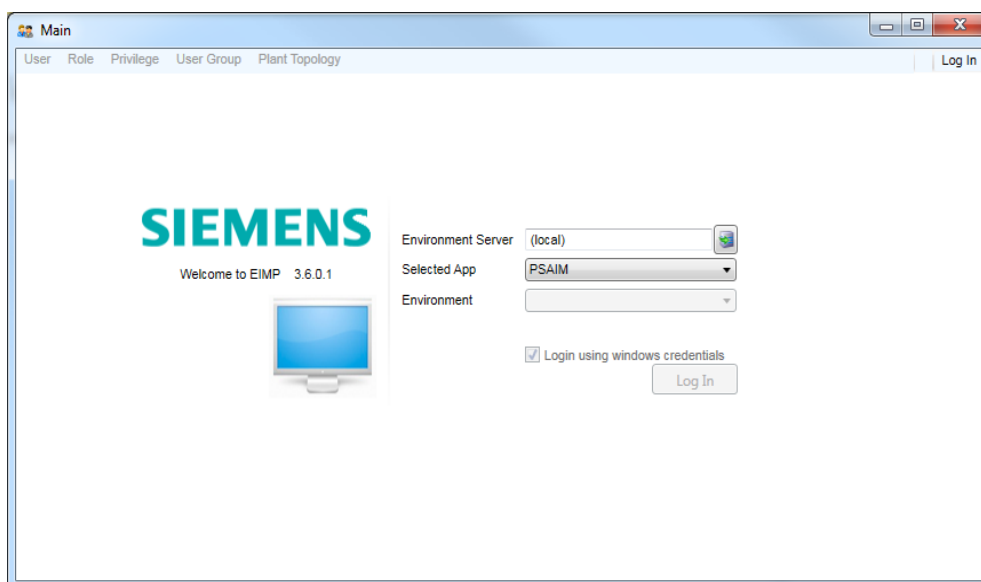
1.1 Logging In

There are two (2) ways to log into the EIMp program:

- Using Windows credentials;
- Using the application username and password.

To log onto EIMp

1. Launch EIMp.
   The "Main" dialog appears.

2. For **Environment Server**, type the EIMp server name and click the **Connect** icon.

3. For **Environment**, click the down-arrow and select the EIMp Environment from the drop-down.

4. Do <u>one</u> of the following:

   - <u>Check</u> **Login using windows credentials**.

   OR

   - <u>Uncheck</u> the windows credentials checkbox. The User Name and Password textboxes appear. Enter the **User Name** and **Password**.

   To change the password, see the topic, *Resetting the Password*.

5. Click **Log In**.

2 Users and Roles

This section covers how to add, edit and delete users and roles.

2.1 Role Permissions

A user can have more than one role and the access to each COMPANY/SITE/UNIT can be associated with each unique role.

Available roles for PSAIM™

Role	Description
Read Only	User has the ability to view, but not to modify
Management	User has the ability to view and perform auditing tasks
Inspector	User has the ability to perform inspection engineering tasks
Engineer	User has the ability to perform all engineering tasks
Champion	User has the application administrator access

Privileges and permissions assigned for each role in PSAIM™

| Feature or Function	Permission	Champion	Engineer	Inspector	Management	Read Only
Site Settings						
Configuration Settings	AIM_MODIFY_ SITESETTINGS	x	x	-	-	-
Drawing Settings						
Corrosion Monitoring Settings						
Activity Settings						
View Site Settings	AIM_VIEW_ SITESETTINGS	x	x	x	x	x
User Settings		x	x	x	x	x	x
Local Drawing Settings						
Local Data Logger Settings						
Selecting Profile						
Custom Filter Settings						
Work Offline	AIM_WORKOFFLINE	x	x	x	x	x
Equipment						
Activate/Inactivity Equipment	AIM_ACTIVATE_ EQUIPMENT	x	x	-	-	-

Privileges and permissions assigned for each role in PSAIM™

Feature or Function	Permission	Champion	Engineer	Inspector	Management	Read Only
Add/Copy/Edit/Delete Equipment	AIM_MODIFY_ EQUIPMENT	x	x	x	-	-
View Equipment	AIM_VIEW_ EQUIPMENT	x	x	x	x	x
Corrosion Monitoring						
Activate/Inactivate Component	AIM_ACTIVATE_ COMPONENT	x	x	-	-	-
Add/Copy/Edit/Delete/Group Component	AIM_MODIFY_ COMPONENT	x	x	x	-	-
View Component	AIM_VIEW_ COMPONENT	x	x	x	x	x
TML						
Activate/Inactivate TML	AIM_ACTIVATE_TML	x	x	-	-	-
Add/Edit/Copy/Clone TML	AIM_MODIFY_TML	x	x	x	-	-
View TML	AIM_VIEW_TML	x	x	x	x	x
Survey						
Add, edit and delete Survey	AIM_MODIFY_SURVEY	x	x	x	-	-
View Survey	AIM_VIEW_SURVEY	x	x	x	x	x
Approve Survey	AIM_APPROVE_ SURVEY	x	x	-	-	-
Structural Tmin						
Add or edit Structural Tmin	AIM_MODIFY_STMIN	x	x	x	-	-
View Structural Tmin	AIM_VIEW_STMIN	x	x	x	x	x
Activity						
Add/Edit/Delete/Complete Activity	AIM_MODIFY_ ACTIVITY	x	x	x	-	-
View Activity	AIM_VIEW_ACTIVITY	x	x	x	x	x
Approve/Reject Activity	AIM_APPROVE_ ACTIVITY	x	x	-	-	-
Drawing						
Add, edit and delete Drawing	AIM_MODIFY_ DRAWING	x	x	x	-	-

Privileges and permissions assigned for each role in PSAIM™

Feature or Function	Permission	Champion	Engineer	Inspector	Management	Read Only
View Drawing	AIM_VIEW_DRAWING	x	x	x	x	x
Data Logger	AIM_DATALOGGER	x	x	x	-	-
Attachment and History						
Add, edit and delete Attachment	AIM_MODIFY_ ATTACHMENT	x	x	x	-	-
View Attachment	AIM_VIEW_ ATTACHMENT	x	x	x	x	x
Edit/Delete History	AIM_MODIFY_ HISTORY	x	x	x	-	-
View History	AIM_VIEW_HISTORY	x	x	x	x	x
Audit Trail	AIM_AUDITTRAIL	x	x	-	x	-
Reports						
Add or edit Reports	AIM_MODIFY_REPORT	x	x	x	x	-
Delete Reports	AIM_DELETE_REPORT	x	x	Delete Own	Delete Own	-
View Reports	AIM_VIEW_REPORT	x	x	x	x	x
SAP						
Add or edit SAP	AIM_MODIFY_SAP	x	x	-	-	-
View SAP	AIM_VIEW_SAP	x	x	x	x	x
Help	AIM_VIEW_HELP	x	x	x	x	x

2.1.1 Creating and Editing Users

To create a user and assign roles

1. From the main menu, click **User**.
    The "User - User Role View" screen appears.
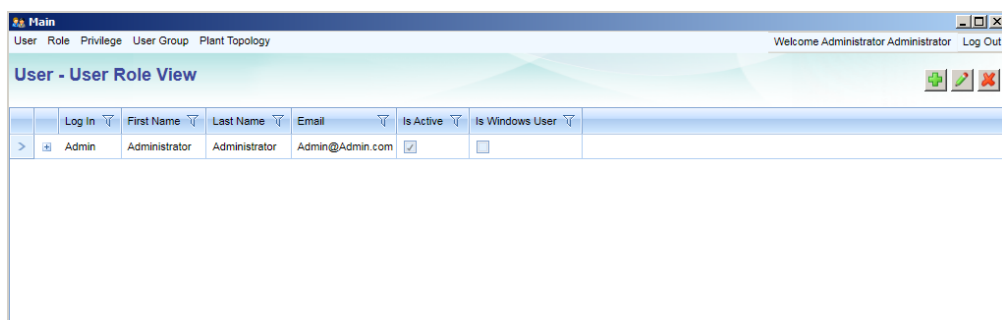
2. Click the **Add** button ( ) *OR* the **Edit** button ( ).

The "User Administration" screen appears.

> ⓘ Fields with a **red asterisk** (*) are required. These represent the minimum information needed to create the user.

3. Select an **Application**.

4. Check the **Active** checkbox.

> ✓ To deactivate a user, you simply deselect (uncheck) the Active checkbox and click Save.

5. For **Log In**, enter the **Windows user name**.

6. Check the **Is Windows User** checkbox.

7. Enter the user's **First** and **Last** names and an **Email**.

8. For each **Role/User Group/Privilege/Business Unit**, select an available item to assign to the user and click the right-arrow ( ) button to add it to the Selected column.

> ✓ To remove an item from the Selected column, select the item and click the left-arrow ( ) button.

> ⓘ A role with an **asterisk** (*) indicates that is a **system role**. So, you must select a resource in order to assign the system role to the user.
>
> For more information on PSAIM™ roles and their assigned permissions, see the topic, *About Roles*.

9. *For system roles:*
From the Selected column for Roles, select the system role and click the **Edit Resources** button.
This updates the resources for the selected role.

> ⓘ If new user information has not been saved, a dialog appears prompting you to save the user information. Click **Yes** to save and continue.

10. Click **Save**.

    For Application Users (not Windows Users), a **password** is automatically generated and the following message appears.
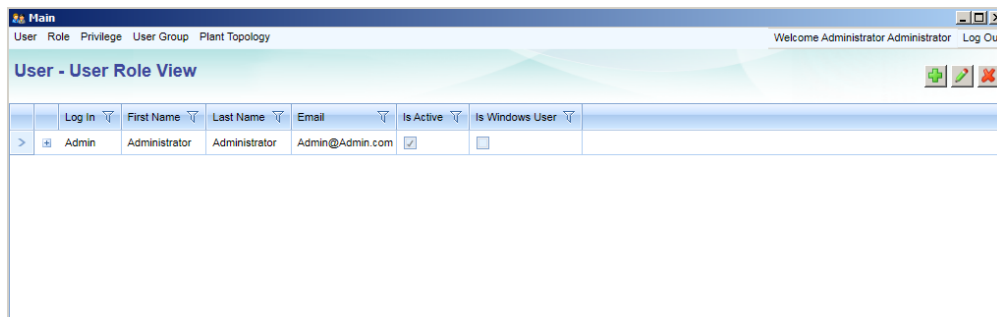

> To copy this temporary password to the clipboard, press CTRL + SHIFT + C
>
> .

Upon the next log-on, you will need to reset your password.

To delete a user

1. From the main menu, click **User**.
   The "User - User Role View" screen appears.

2. Select (to highlight) the user you want to remove.

   > A user cannot be deleted if there are Role(s), Privilege(s), User Group(s), and or Business Unit(s) associated with the user.

3. Click the **Delete** button ( ).

2.1.2 Resetting the Password

When resetting your password, the new password must be:

- Alphanumeric, consisting of only letters (a-z, A-Z) and/or numbers (0-9);
- Six to fifteen characters long;
- Different from the previous password.

To reset the password

1. Log onto EIMp.
   The log on page appears.

2. Enter your existing password, then enter (and re-enter) the new password.

3. Click **Log In**.

2.1.3 Creating and Editing Roles

This section describes how to add, edit and delete a user role. It also shows all the user(s) assigned to each role.

A role with an **asterisk** (*) indicates that is a **system role**. System roles are pre-defined and <u>cannot</u> be edited or deleted.
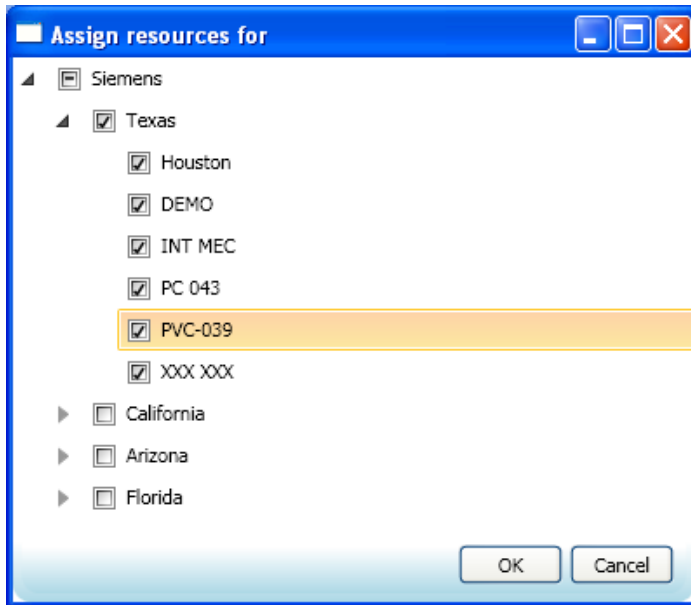
To create (or edit) a role

1. From the main menu, click **Role**.
   The "User Role - User View" screen appears.

2. Click the **Add** button ( ) *OR* the **Edit** button ( ).

   The "Role Administration" screen appears.

> Fields with a **red asterisk** (*) are <u>required</u>. These represent the minimum information needed to create the role.

3. Select an **Application**.

4. Check the **Active** checkbox.

> To <u>deactivate</u> a user, you simply deselect (uncheck) the Active checkbox and click Save.

5. Enter a **Role Name**.

6. For each **User/Privilege/User Group**, select an available item to assign to the role and click the right-arrow ( ) button to add it to the Selected column.

> To <u>remove</u> an item from the Selected column, select the item and click the left-arrow ( ) button.

7. Click **Edit Resources**, which is located at the upper, right-hand corner of the dialog box.
    The "Assign resources for" dialog appears.

8. Check the location(s).

   In order to save, each application role must have at least one resource assigned to it.

9. Click **OK** to assign the resource(s) for the application role.
   This returns you to the "Role Administration" screen.

   A resource inherits permissions for all sub-resources. For example, assigning a COMPANY to a user grants that user access to all SITES and UNITS. Similarly, assigning a SITE to a user grants that user to the UNITS under the SITE.

10. Click **Save**.

To delete a role

1. From the main menu, click **Role**.
   The "User Role - User View" screen appears.

2. Select (to highlight) the role you want to remove.

   A role cannot be deleted if there are User(s), Privilege(s), and/or User Group(s) associated with the role.

3. Click the **Delete** button ( ).

3 Privilege

This dialog shows all the user(s) who are assigned to all the available privilege(s).

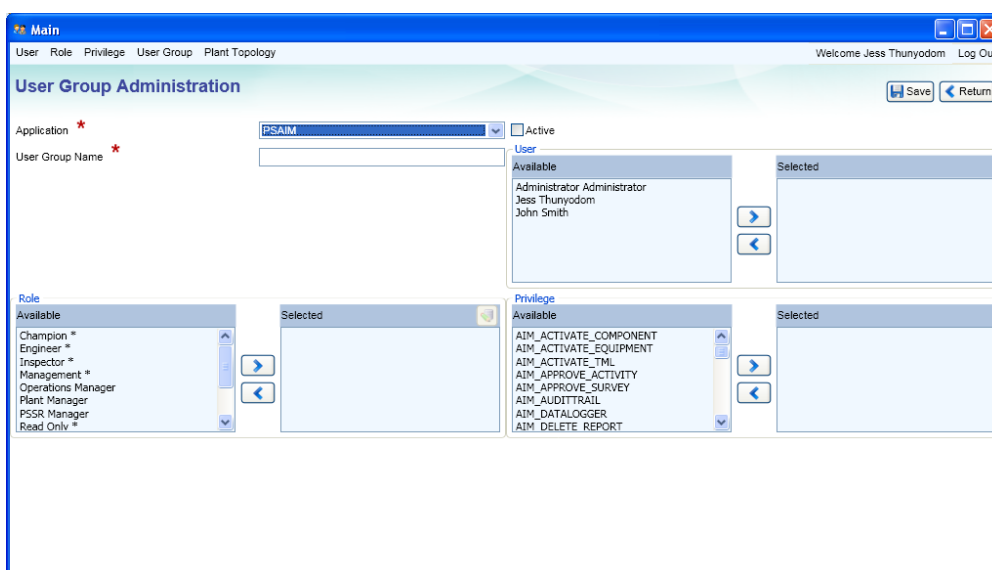*This dialog simply displays the users. There are no options to configure.*

4 User Group

This section describes how to add, edit and delete user group. It also shows all the user(s) who are assigned to each user group.

To create (or edit) a user group

1. From the main menu, click **User Group**.
    The "User Group - User View" screen appears.

2. Click the **Add** button (   ) *OR* the **Edit** button (   ).

    The "User Group Administration" screen appears.

> Fields with a **red asterisk** (*) are required. These represent the minimum information needed to create the user group.

3. Select an **Application**.

4. Enter a **User Group Name**.

5. For each **User/Role/Privilege**, select an available item to assign to the user group and click the right-arrow ( ) button to add it to the Selected column.

    > To remove an item from the Selected column, select the item and click the left-arrow ( ) button.

6. Click **Save**.

To delete a user group

1. From the main menu, click **User Group**.
    The "User Group - User View" screen appears.

2. Select (to highlight) the user group you want to remove.

A user group <u>cannot</u> be deleted if there are User(s), Privilege(s), and/or Role(s) associated with the user group.
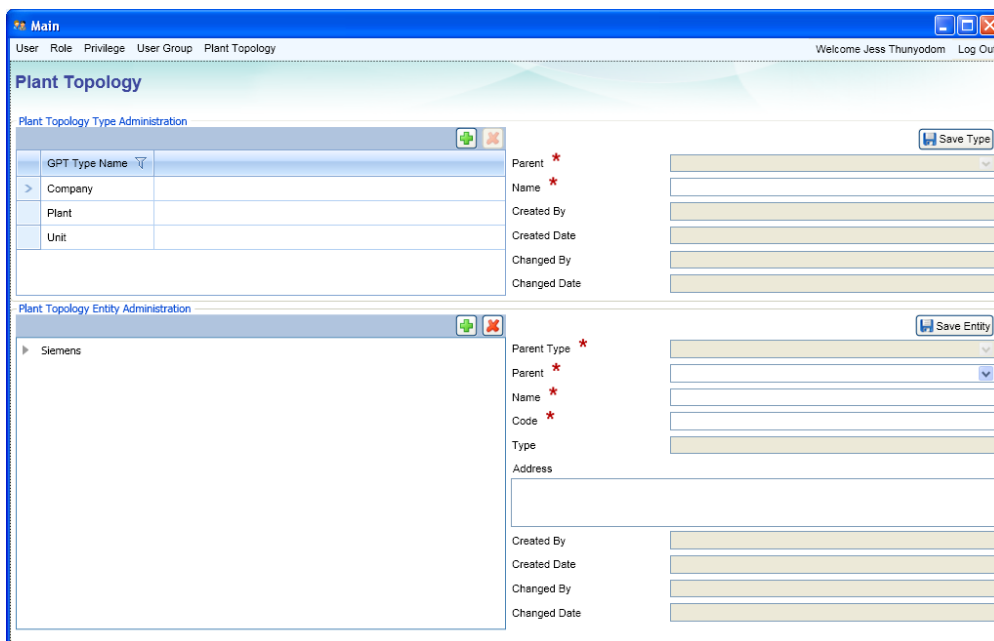
3. Click the **Delete** button ( ).

5 Plant Topology

This section describes how to configure the plant topology types (COMPANY/SITE/UNIT) and to add, edit and delete the plant topology entity.

> ⛔ It is highly recommended you fully configure the plant topology prior to using the PSAIM™ application.
>
> Changes made to plant topology is reflected in the application after 10 minutes.

To configure the plant topology

1. From the main menu, click **Plant Topology**.
   The "Plant Topology" screen appears.

> ℹ️ The Delete button for the Type Administration group is disabled to allow a one-time set-up.

First, you define the type.

2. For **Type Administration**, either click the **Add** button ( ) *OR* select a plant topology type.

3. Do one of the following:
   - To add a **parent-level** type, enter the **Name** and click **Save Type**.
   - To add a **child-level** type, enter the **Name**, then select the **Parent**, and click **Save Type**.

   > ℹ️ Fields with a **red asterisk** (*) are required.

Next, define the entity (or the plant topology data).

4. For **Entity Administration**, either click the **Add** button ( ) *OR* select a plant topology entity.

5. Select a **Parent** from the drop-down list.

6. Then, enter a **Name**, **Code**, and **Address**.

7. Click **Save Entity**.

To delete an entity

 Prior to deleting a parent entity, all children must first be deleted.

1. Select (to highlight) the entity you want to remove.

2. Click the **Delete** button ( ).