Füllstand Druck Durchfluss Temperatur Flüssigkeits-analyse Registrierung Systeme Komponenten Services Solutions

# Offline Configurator

User Guide

Endress+Hauser

People for Process Automation

# Welcome to the Offline Configurator

Endress+Hauser has evolved from a supplier of measuring technology to a complete provider with the aim of supporting you through the entire life cycle of your facilities and increasing their industrial productivity.

Using the Offline Configurator, you can now configure your product even more quickly and easily to subsequently add it to the shopping cart, print it out or export it. Choose from the export formats PDF, WORD, Excel or a simple TXT file. You can also individually compile your catalog and then use the export function. The CD can also be started without any prior installation.

In addition to the instruments, PDFs of the technical documentation can also be called up at the click of the mouse.

This manual provides a detailed description of how to work successfully with the Offline Configurator.

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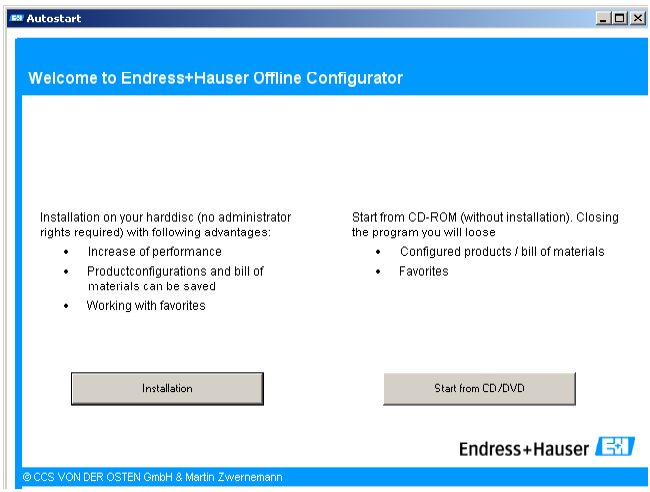
# Using the Offline Configurator



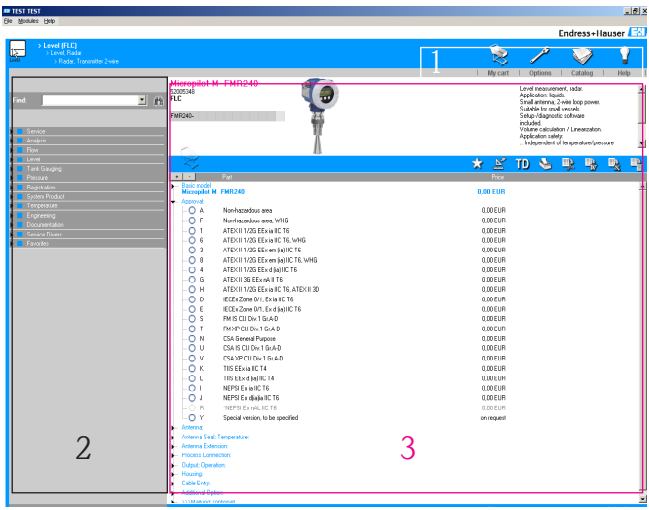

**1. Starting from the CD**
You can use the Offline Configurator completely without having to install it on your computer.

**2. Copying (installation without administrator rights)**
If you do not have administrator rights for your computer, you can copy the entire contents of the CD to your hard disk and use the program without the CD.

**3. Installation (incl. W@M tool set)**
To install the Offline Configurator, select the "Installation" button and follow the instructions.

**4. New – Applicator installation**
The installation of the Applicator is also optionally available.

# Introduction to the user interface of the Offline Configurator



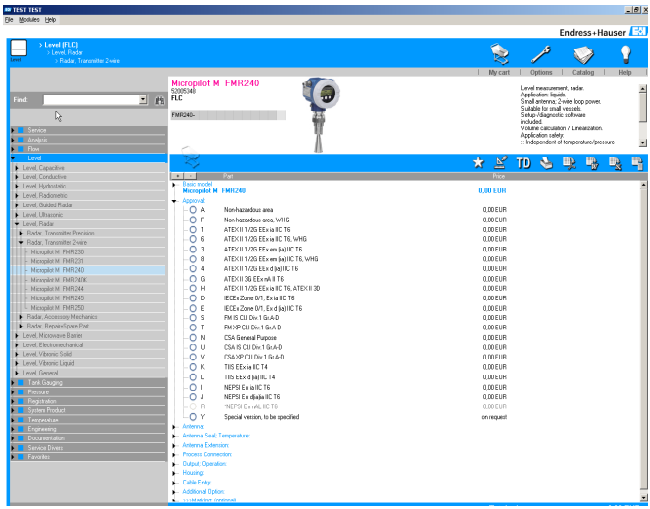

The Offline Configurator is split into three sections:

- The top section (marked white in the screenshot) contains the higher-order functions. They contain the shopping cart, options, export options and the help.

- The section on the left (marked red in the screenshot) contains the navigation area that consists of a search and navigation structure.

- In the large main section (marked blue in the screenshot), you can find the product page where the instruments and instrument specifications are displayed and where instruments can be configured.

# Default settings / higher-order functions

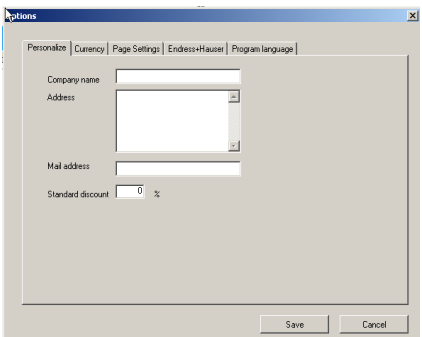



Four buttons are located above the product configuration area to run the basic settings individually:

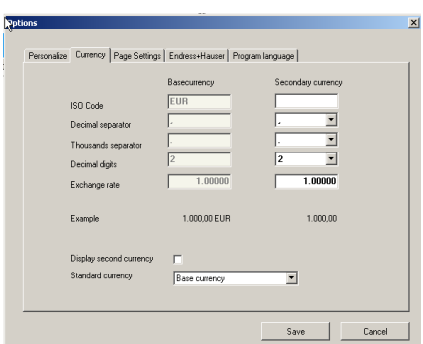
The direct way to a **shopping cart** already created

The **Options** button to configure the basic settings:

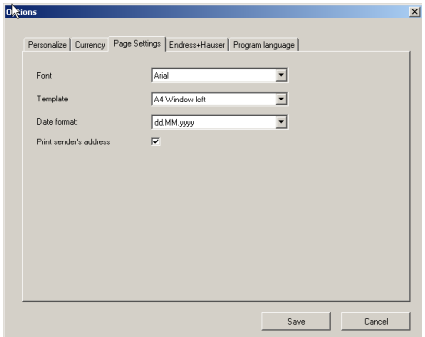
The user enters personal information in the first tab. As with all the other settings under Options, this entry can be changed at any time. Changes to the address only affect future carts and cart export. Existing carts retain their own specific sender.



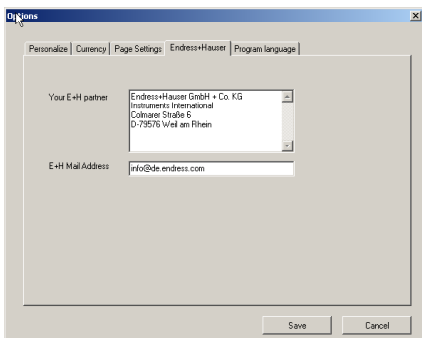

Under the Currency tab, a secondary currency can be selected in addition to the base currency and displayed if so required.



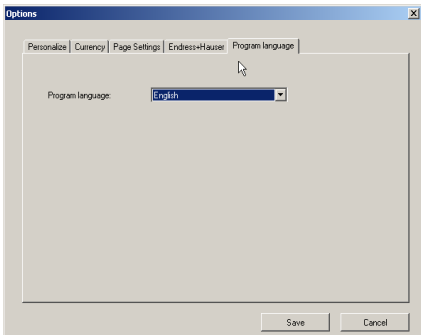
The third tab – the Page Settings tab – can be used to select the font and layout for printing and export.




The fourth tab contains the default information on Endress+Hauser which can be changed if necessary.

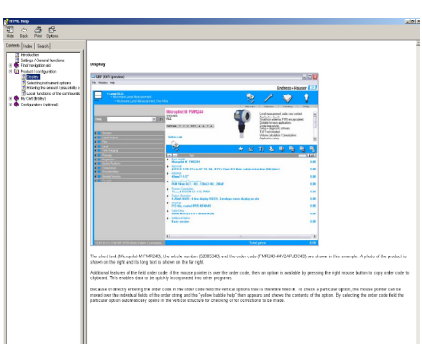


The program language can be selected in the fifth tab. German, French, Italian and Japanese are supported in addition to English.




The **Catalog** button allows you to print and export a catalog to PDF, Word, Excel, XML and text format to the export folder. The zoom function can be used in the print preview.

The **Help** button opens the help text.



# Searching / navigating

This chapter explains the left-hand side of the program which deals with searching and navigating.

**Navigating**
The user navigates using a tree structure created in the left-hand area of the screen. This structure is split into business areas and sales groups. While navigating, the position and sales group key are shown in the top left-hand screen area.

**Searching**
There is a central search field that allows the user to directly get to the desired article quickly.

Version 1
You can search by product name (brief article description), article number or product root.

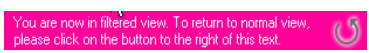
Some examples include:
Product name: Micropilot-M
Article number: 52005348
Product root: FMR240

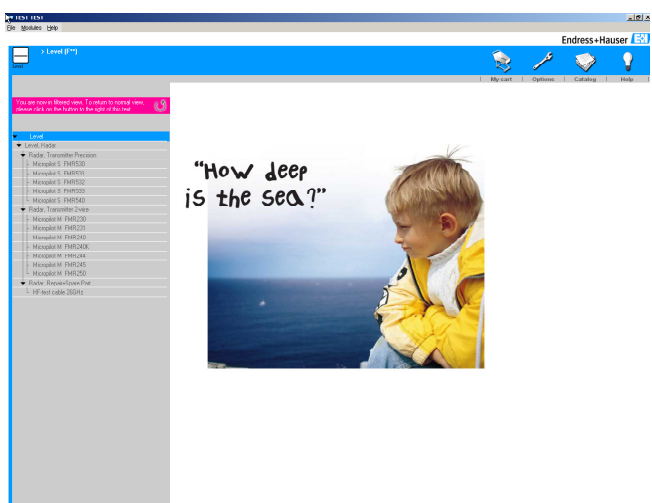
If you only know parts of the product name, you can use wildcards in the search term. Here, "%" refers to any number of characters. So, if you are searching for "Delta%", you will find Deltapilot, Deltabar, Deltaset and Deltatop, for example. If you only want to substitute one character, you can enter "_". For example, if you are searching for "Promag 10_ DN", you will find Promag 10P DN, Promag 10W DN and Promag 10H DN.

Version 2
Another way of searching for products is to enter the complete order code. Here, you are systematically searching for a product that is already configured. The order code consists of a root that describes the unconfigured basic product, the string containing the configurations of the instrument and a hyphen that separates the first two elements from one another.

Example: FMR240-44V2APJBC4B
"FMR240" is the root of the order code.
"44V2APJBC4B" is the string of the order code. When entering the order code, make sure you do not forget the hyphen between the root and the string! Otherwise, it will not be possible to find the product.

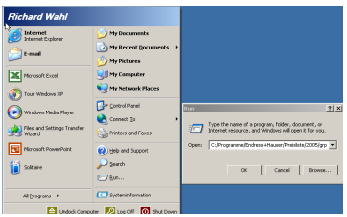
Comment:
If several products are found with the search query, the search results are displayed in the tree structure. This view only shows the search results. It no longer corresponds to the original navigation structure display. To return to the original view, click the arrow in the magenta window.



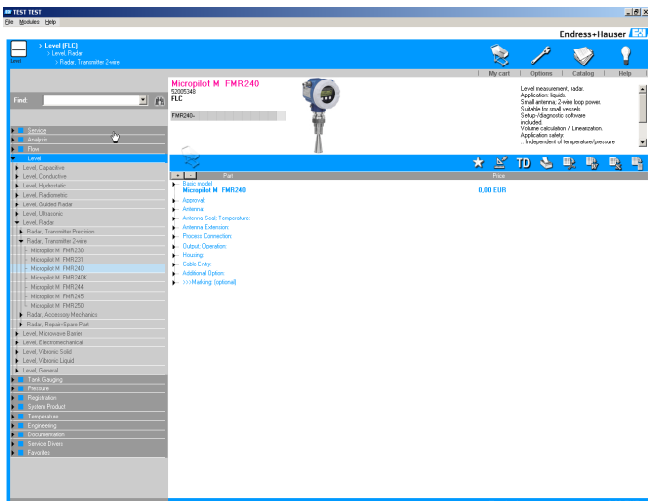
You can also find a product directly without having to start the program. In the task bar of the Windows operating system, select Run and enter the path name. For example, enter C:\Programs\Endress+Hauser\Pricelist2005\grp.exe /search FMR240-37V1CMJDC5A

The program starts automatically and the product that is being searched for is displayed immediately in the main area.



# Product configuration

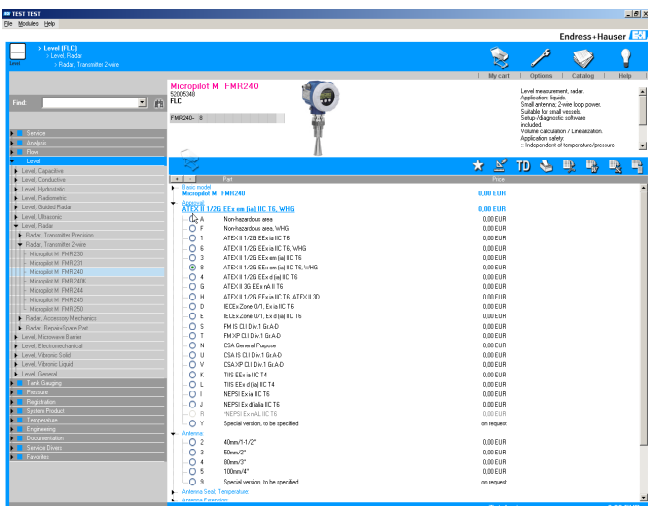
This chapter describes the main area where users can configure and display the products. This area consists of the display and the option selection.




**Display**
The brief article description (Micropilot-M FMR240), article number (52005348) and order code (FMR240-44V2APJBC4B) are displayed in this area. A photo of the product and/or a technical drawing is displayed to the right of this information. The long article description containing all the options already configured is shown on the extreme right.

Additional features in the order code field: If the cursor is positioned over the order code, you can click the right mouse button to copy the order code to the clipboard and use this information for other files.

If the order code is entered in the horizontal field, the vertical options are filled in automatically. For verification purposes, it is also possible to click random fields in the order code. The option in question then opens in the horizontal area.




## Option selection

The option selection consists of a transparent list of the option groups and their suboptions.

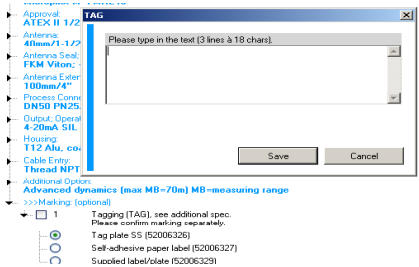
The instrument is configured by selecting the buttons in front of the particular option in question. Only the option to be processed is expanded. Following selection, the configuration is displayed in bold in the heading and the next option group is opened automatically. This is known as vertical configuration.

To get a clear overview, the complete structure can also be opened. To do so, activate the "+" button on the upper left in this window. The "–" button closes the structure.

Optionally, you can also enter the order code directly (horizontal configuration – see also Page 14).

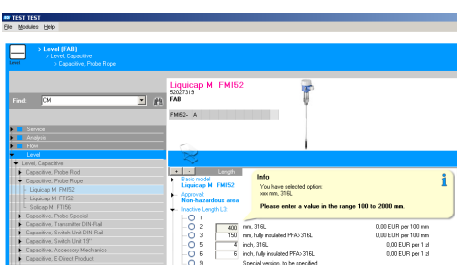
Mutually exclusive relations are also taken into account in each type of configuration. For example, if an option is selected which causes another option to be excluded, the latter is then marked in gray and thus can no longer be selected. The order code is automatically completed each time an option is selected. The total price is also calculated dynamically during the configuration.

With the "Special Version" option (Y or 9), there is an additional entry field where user requests can be entered. This field has to be filled in. Otherwise, the option is not accepted. The price for this individual option cannot be determined immediately and can be requested. If a quote from Endress+Hauser is already available, the quote number and the specified list price must be entered.




## Optional characteristics (BUS/TAG)

From version 3 of the Offline Configurator onwards, the configuration is extended by optional characteristics. Here, additional data such as the TAG and BUS of the measuring point can be recorded for unique identification.

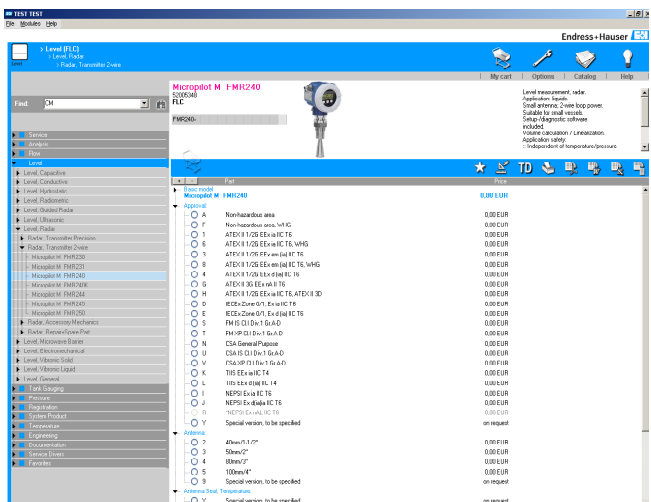



## Quantity information / plausibility check

An input field for specifying the quantity can be found in front of some options. The plausibility range is displayed before the user enters any information. If the data entered are outside the specified range, an error message appears. Different units (e.g. length, pressure), as well as pricing denominations (e.g. €10.50 per 100mm), are taken into consideration in this input field. The price is calculated and rounded off and is integrated into the overall calculation. Every variable option field is marked red in the order code until a value has been entered or the suggested value has been verified by the user clicking it. Only then can the product be added to the cart.

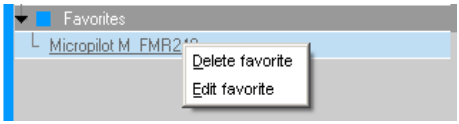
## Local options in the configuration area

Nine functions can be found in this area:




The first function – the spare parts search tool – automatically connects you to a page in the Internet where you can see a list of the spare parts to suit the configured product.

The second function constitutes being able to add the configured article to the favorites list. In this way, you are taken directly to the partially or fully configured product without having to go through the search function. The product can then be altered, amended or another configuration can be added to the favorites.



Each favorite can be deleted with the right mouse key or the name of the favorite can be changed.

The draw button allows the user to call up technical drawings as WMFs on the product in question, if such drawings are available.

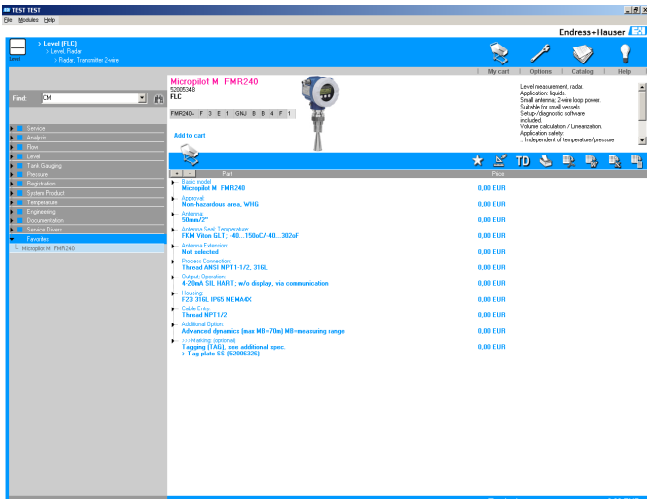
The TD button calls up the product-related technical information as a PDF file, if available.

The printer button allows the user to print the un-configured or configured product. All the pages are paginated automatically. You can zoom in and out of the pages in the print preview.

The remaining four buttons allow the user to export to PDF, Word, Excel, XML and text format to the export folder.

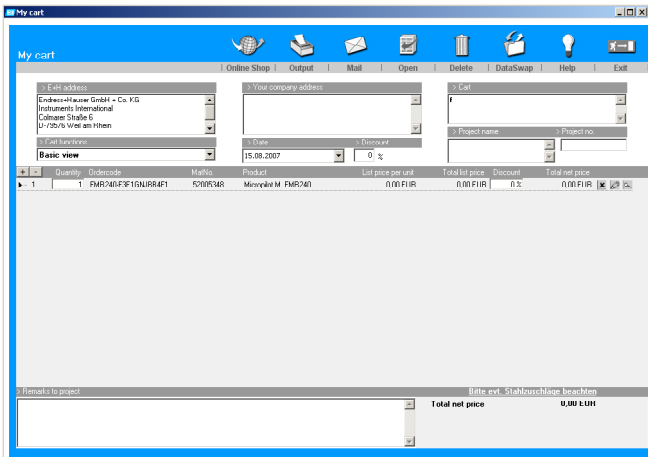
Note: If Acrobat is not installed on your computer, it can be downloaded from www.adobe.com.

# Cart




To add a fully configured product to the cart, click the "Add to Cart" button on the product side. Please note: It is not possible to add an article unless the order code has been entered completely or selected. In the dialog box, you choose whether you want to use an existing cart or a new cart. Once you have added a product to the cart, the cart opens automatically. If you would like to open the cart manually, you can do so using the "My Cart" button in the top operating bar.

## View in the cart




The upper area consists of eight functions:

- Online Shop, Export and print, delete, open an existing cart, mail, online help, data interface and close the cart.
- The lower section consists of seven windows:
- The destination address (E+H) is prespecified but can be over-written.
- The sender address is automatically taken from the "settings" but can also be overwritten.
- The cart number or description
- The project name
- The project number

- The discount
- The cart function – the basic cart that only displays the configured products or the extended cart that allows additional items.
- The date which can be called up using the integrated calendar.
- The main window of the cart appears beneath these seven windows with the list of the selected products with the line item numbers and a large field for general comments.
- The sequence of the line items can be changed using the "Drag+Drop" function.

**Options in the cart**
Click the Edit button to go back directly to the configuration page where you can edit this line item. You then decide whether you want to put the edited product back (save changes) or would like to create another line item from it (add to cart). To delete a line item, click Delete.

If a second currency was selected in the options, this can be enabled or disabled using the two buttons in the corner in the top right.

The complete net price is shown at the bottom on the right.

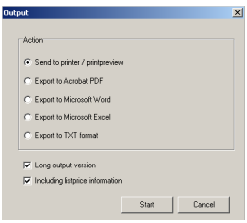
**Special features of the extended cart:**
Additional line items allow the user to record costs for "non-Endress+Hauser products", transportation or packaging. Additional rows are generated automatically. The VAT and the gross price are displayed on the bottom right.

## Export and printing function in the cart

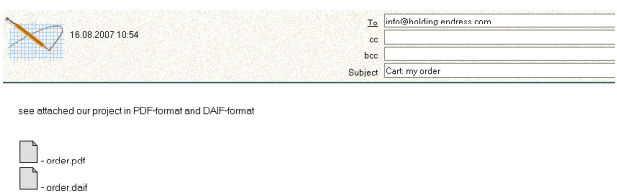
These functions facilitate the exchange of information on fully configured products that are in the cart. This applies to both the internal and external creation of queries, quotes and drafts.

There are four output functions:

Firstly, the option of saving the current cart to the export folder in different file formats (PDF, Word, Excel or TXT) or printing it out like in the configuration program.




Secondly, the mail function:
When the Mail button is used, a PDF and a DAIF file are automatically generated and the standard mail program is started. You can change the destination address and enter additional text. The DAIF format allows the recipients to load the cart directly in their configuration program and view and process it with their own particular prices.



Thirdly, exporting as DAIF format via DataSwap. This interface makes it possible to export or import existing shopping carts of other users in the network or using data storage media.

Fourthly there is also the possibility to transfer the Shopping Cart directly into the Online Shop. You can do this by clicking this symbol [X]. This will activate a connection and the Shoppng Cart will be automatically transferred to the Endress+Hauser Online Shop. In the following field you can enter your customer data.

**Import function in the shopping cart**

As with the data export, "third-party" data from customers, partners or colleagues can also be read in via the import interface/the DAIF format. This comfortable interaction not only saves data recording time, but also makes it possible to create new individual shopping carts and react quickly.

**Additional functions of the shopping cart**

Using the "Open" button, existing proprietary or "third-party" shopping carts can be opened and further processed.

The "Delete" button deletes the shopping cart that is open.

The "Help" button calls up the online help

The "Exit" button is used to exit the shopping cart and return to the Configurator.

## Configurator+, the graphical configuration of temperature products (optional)

Configurator+ supports the graphic display of all product-specific features. With each configuration step, the image of the product is generated dynamically with the selected features. In addition, Configurator+ explains and illustrates the features where applicable with an integrated knowledge database and a "learn more" section that provides the user with basic knowledge.

Calculation tools are also available as additional user support to calculate the ambient and process temperatures and lengths of the measuring inserts.

The thermowell configuration depending on the insertion length of the thermometer is integrated in the Configurator+.

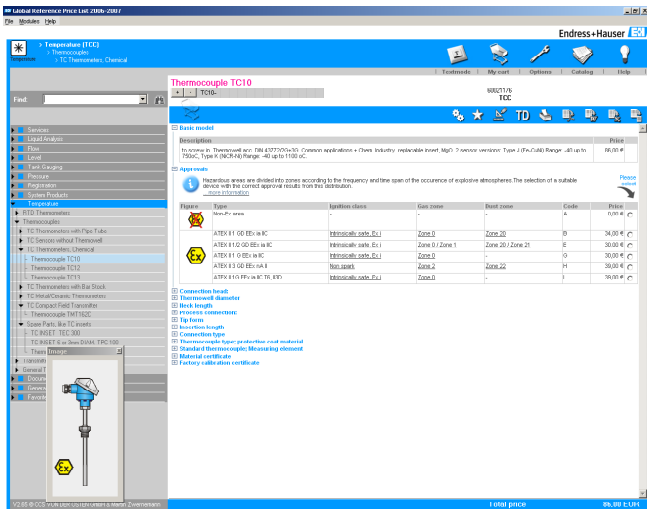
The user can switch between the Configurator+ and the classic Configurator in each feature area.

A particular feature is online access to the spare parts finder (gear icon in the operating bar above the product) which is on Endress+Hauser's Internet pages. The response time depends on the complexity of the request.

Users who do not have a profound knowledge of temperature measuring technology are thus given the opportunity to extend their know-how, configure a product completely, save it, print it and transfer it to the shopping cart, create RfQs or trigger orders.

The Configurator+ can be installed as an integral part of the W@M tool set. Simultaneous installations of different Configurator versions are possible. Partially configured products can be passed on from the Applicator. The information is passed on directly to the Configurator+ in the event of temperature applications. Following complete selection, the product is sent back to the Applicator.

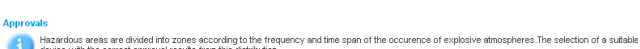
## Operation

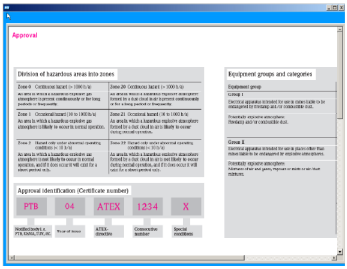



Generally speaking, the operation and sequence of the features of the Configurator+ correspond to that of the classic Configurator. In addition, the dynamic product image, and the calculation tool, where necessary, appear on the left-hand side. For ergonomic reasons, the radio buttons for selecting a feature are located on the right-hand side.

### Introductory text

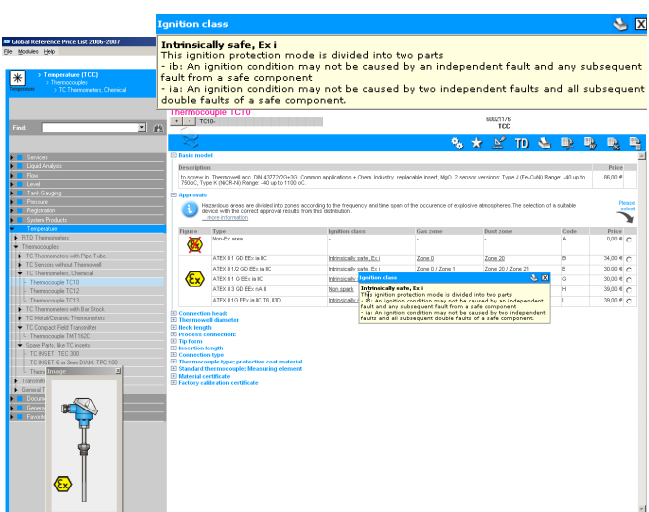
Introductory text explains the function and use of the feature. If an information button is located beside this text, basic information ("Learn More" function) can be called up.





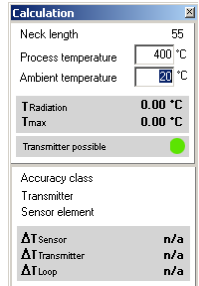

## Knowledge database

The knowledge database is available at points where text is underlined. If you hover over this text section with the mouse, the explanatory text and/or a graphic appears after approx. 2 seconds. The information can be called up immediately by clicking the text once. The content is printed by selecting the printer icon.



## Calculation tool

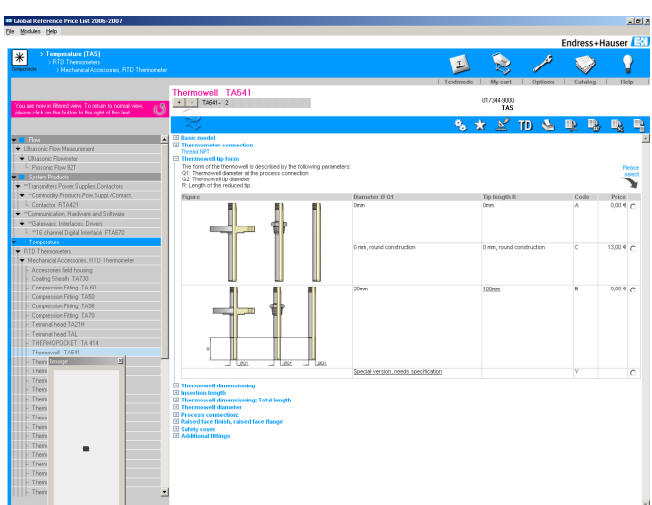
The calculation tool calculates the neck length using the ambient temperature and the process temperature that are entered by the user. A "traffic light" signals the applicability. In addition, T-radiation, T-max. and Delta-T are also displayed dynamically.




## Thermowells

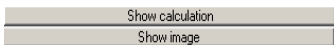
To configure thermowells, the system automatically switches if the corresponding feature of the thermometer has been selected.

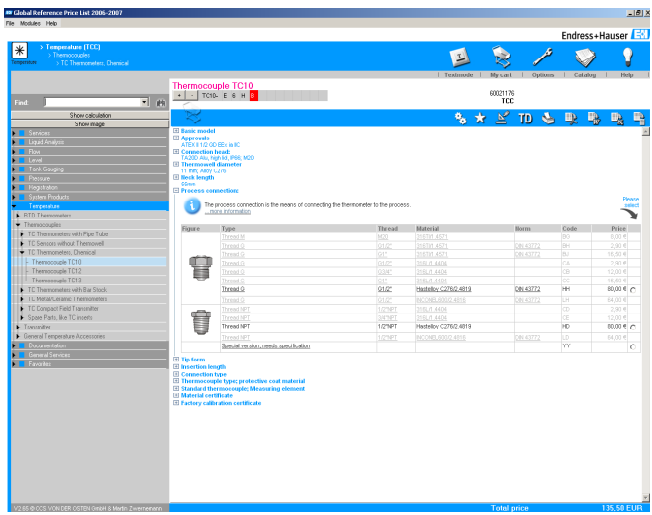
Thermowells should be regarded as standalone products even though they depend on the thermometer selected. For this reason, they have to be placed separately into the cart. They are highlighted in magenta here.



## General information

Both the dynamic product image and the calculation tool can be closed. To call up these features again, click the long button under the find.




The user can switch between the Configurator+ and the classic Configurator using the "Switch" button in the main control bar at the extreme top.

## FAQs / How To

**How do I get new products in the Offline Configurator?**
Order a new Offline Configurator from your Sales Center. As explained on Page 8 of this manual, the address data and e-mail information are provided in the options under the Endress+Hauser tab.

**How long is the Offline Configurator valid for?**
Normally, for the duration of a price list period – from September 1 of one year to August 31 of the following year. This information is provided in the menu bar under Help/Info.

**How do I get a new Offline Configurator?**
Please contact your local Sales Center. As explained on Page 8 of this manual, the address data and e-mail information are provided in the options under the Endress+Hauser tab.

**What do I do if I have received a new version of the Offline Configurator?**
You can install an unlimited number of versions simultaneously but have to copy them to different directories.

**How do I avoid losing existing carts if I uninstall the Offline Configurator?**
Backup or copy the shopping carts to a separate directory that has nothing to do with the path of the program directory of the Configurator.

**Can I install different Configurator versions in the W@M tool set?**
Yes, as many versions as you like can be installed, also in different languages.

**Are shopping carts or favorites saved even if I do not install the Offline Configurator?**
No, shopping carts and favorites can only be saved if the Offline Configurator is installed.

09.03/MMC

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