

Viewport 5.3 User Guide

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About this document

This is the user guide for Viewport 5.3. It provides information about what Viewport is, and how you can use Viewport. This user guide does not describe how to configure the system, or use features that require specific roles (like a system administrator or a content administrator) -- that is described in the [Administrator Guide](#).

Valid for version: Viewport 5.3

Introduction: What is Viewport?

Viewport is an AI-powered application for the Process Industry. Viewport helps you find information, such as manuals, drawings, asset data, real time data, and maintenance data, regardless of where that information is stored. It works by connecting to the various existing source systems that you may be using on a day to day basis.

Viewport does not replace your network share, Document Management System (DMS) or Maintenance Management System (MMS), but indexes the contents of these systems. It provides a global search function, so you can find the information you are looking for. With built-in OCR capabilities and a viewer that supports over 140 different file formats, Viewport puts both legacy and good quality data at your fingertips.

Besides searching and viewing capabilities, Viewport's AI algorithms search for links, or **cross-references**, in your data. It uses document numbers, tag numbers and other identifiers to look for patterns in the data. Even if there is an overlap in numbering schemes, outdated identifiers, or ambiguities, Viewport provides the necessary flexibility and configuration options to make the links work for you and your organization.

Many different source systems and data formats are supported, such as MS Office files, AutoCAD and MicroStation files, PDF drawings, scanned files, and so on. The suite of standard connectors can retrieve data from systems such as Documentum, Meridian, SharePoint, SAP, Maximo, and Ultimo. Connectors can pick up approved content that has been created or updated, and send it to Viewport for further processing. Typically, only the most recent approved version of files and data points are published by Viewport.

Viewport's interface is entirely web based. Only a browser and network connectivity are required for clients to access Viewport.

- Speeds up data retrieval from manuals, drawings and other sources
- Streamlines publication processes
- Transparent implementation
- Web-based and robust

Getting started with Viewport

Viewport is a web application. This means that you need a supported browser (any recent browser version is fine) and a link to the Viewport homepage, as well as login details (username and password) or a connection to your Windows network (if Viewport uses Active Directory integration) or if your organization requires it, the central login point (also called 'Single Sign-On'), for example Microsoft Entra ID or Google.



TIP

As a (non-administrator) end user, you will find that Viewport does not have any possibility to make changes to documents and data. Things that you customize in the interface are for your user account only. There is not much that can go wrong...

Feel free to experiment and try things out!

About customizing settings

There are several things that you can customize in the interface, including (but not limited to):

- Changing the appearance of items in the tree views
- Changing column widths, or column visibilities, of tables.
- Remembering your name and e-mail address in the "Feedback" form
- CSV download settings

These settings are remembered in your *currently used browser* only. It means that no one else logged into Viewport is affected, nor will you see these customized settings if you use a different browser or log on on a different machine.

It also means that, if you delete all your browsing data, you may also reset customized settings; use "Delete temporary internet files" only, not "Offline website data" (or how it is called in your browser) to prevent this from happening.

How information is organized in Viewport

Source systems and Connectors

As stated in the introduction, Viewport contains documents and data from your existing network shares, document management system (DMS), maintenance management system (MMS) or other **source systems**. To keep everything up-to-date in Viewport, it uses helper applications called **connectors** that monitor the source systems in a continuous, automated fashion. Whenever something is created, updated, or deleted in the source systems, the connectors are responsible for processing the change in Viewport so that it is also created, updated, or deleted there.

The content is stored in **collections**. You cannot view the contents of collections directly, but you can view the contents in **sites** where these collections are published to. Sites will be explained in more detail later on.

NOTE

Here and there you may spot a label "Is part of" that tells you which collection an item is stored in. This information is useful for Content Administrators that have to configure Viewport.

A collection can be published in multiple sites, so a single document may show up in a couple of places -- in the Viewport database, it is still a single document though!

About various dates and times (timestamps)

The content in Viewport comes from other source systems, where the data is created, updated and deleted. Any type of change in the source system has a related timestamp:

- **Create Time:** when was the item created in the source system?
- **Last Write Time:** when was it last changed in the source system?
- **Last Access Time:** when was it last accessed in the source system?
- **Delete Time:** when was it deleted from the source system?

NOTE

Not all source systems have these timestamps. Last Access Time and Delete Time are usually not available.

Viewport adds its own timestamp to this list:

- **Last Import Time:** when was the item last imported in Viewport?

The order in which items change in the source system are not necessarily the order in which the change is processed in Viewport. For example, if a source system modified file A, then B, Viewport may import them B first, then A. To prevent confusion, it is important to understand this difference between the (source's) Last Write Time versus (Viewport's) Last Import Time.

If a connector is not running, it received too many changes at once, or cannot detect changes as they are happening, a connector can start up a process called **synchronization**. This process runs in the background, finding and processing changes that may have gone undetected. This can be another reason why there is a (significant) difference between the Last Write Time and the Last Import Time.

Sites

Contents in Viewport are published into one (or more) sites that typically share a common theme. For example:

- A site contains all as-built documents (or all archived documents)
- A site is relevant for a particular department
- A site contains all information related to a particular project.
- Most commonly for Viewport instances in the industry, a site corresponds with a **physical asset** such as a factory, a platform, a wind farm, or a ship.

Name, Alternative Name and Version

Items can have any kind of metadata, but when they are published to a site they all get these common site publication attributes:

- **Name:** the primary name of an item.
- **Alternative name:** an alternative text or label that is generally useful to see, which is shown next to (or below) the Name.
- **Version:** an indication of the version (such as a revision number)
- **Version for sorting:** a version that is easy to sort by a computer; this may or may not be the same as the Version.
- **Type:** the type of item, for example a File or a Functional Location
- **Subtype:** a specialization of the item type, e.g. what type of File it is (Excel, Word, etc.)

The Name, Alternative Name and Version are populated depending on which type of an item Viewport is publishing:

- For *files*, the Name is typically populated with a document title or filename (e.g. "Inspection Report 5 November"), Alternative name with (the primary) document number (e.g. "OPS-REP-12832") and Version with e.g. "1.1"
- For *functional locations*, the Name is typically populated with its tag number (e.g. "V-100") and the Alternative name with the functional location description (such as "Water Vessel") and Version with "Latest" (since functional locations are usually not versioned).

Viewing content

All the contents that are published to sites can be viewed in the Viewport web application. Files, such as documents, drawings and photos, can be viewed in the built-in document viewer, that has a lot of features explained later.

Content includes:

- Files
- Web Pages
- Data Tables
- Functional Locations
- Work folders
- Reports

Each type has its own viewer.

References, Possible References and Patterns

A key feature of Viewport is the ability to find **references** in content. A reference is a pointer from one item to another. For example, a document number that is mentioned in a document may point to (refer to) another document. Another example is a technical drawing that contains symbols with tag numbers, that refer to functional locations and equipment data from a maintenance system.

Viewport can learn to recognize what references look like, by making **patterns** out of the document numbers or tag numbers. When the pattern is used to search for references, not every text that is found by the pattern refers to an existing document or tag number. If text is found by a pattern, but the text does not actually reference an imported item, we call that a **possible reference** (sometimes used interchangeably with the term *candidate*).

Possible references generally indicate that documents or data is missing in a source system. This kind of information is typically difficult to establish, but Viewport can determine it for you automatically.

Use cases for possible references are:

- Finding missing documents in document management systems
- Checking transmittals for completeness
- Determining which tags are missing in maintenance management systems, or commissioning packages
- As part of a review/QC process, finding misspelled tags or document numbers
- Indicating to end users that items are missing, *before* they start a fruitless and possibly time-consuming search in the source system(s).

Issues with possible references may be:

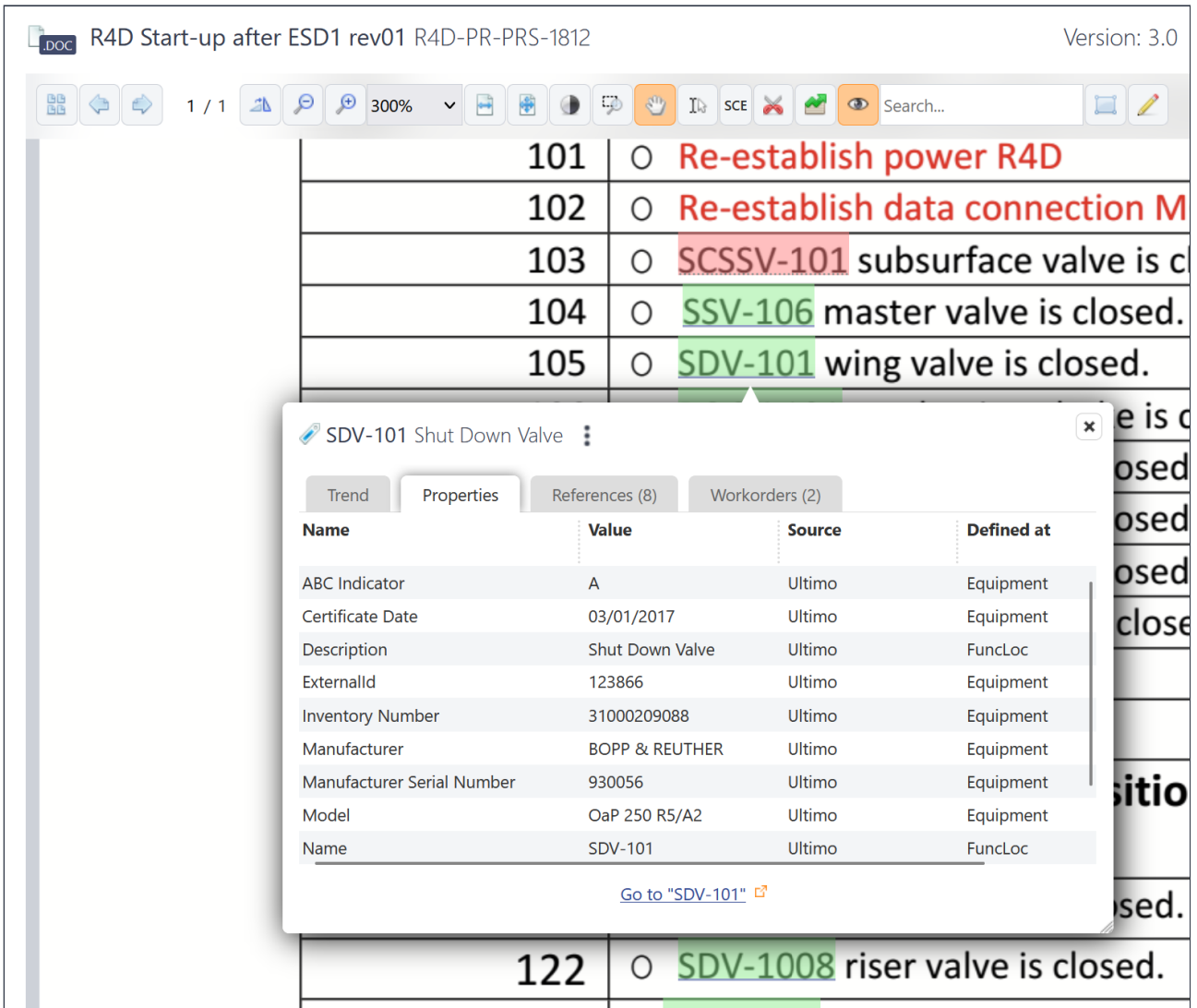
- **False positives:** Viewport may indicate that a tag number is missing, whereas it is not a tag number at all (e.g. "NOV-2023"). This can be remediated by adjusting the patterns or by using manual Quality Control (QC) functionality in Viewport.
- **False negatives:** it could be that a tag number *appears* to be missing, but is not imported because it did not match the necessary import criteria.

The document viewer built into Viewport will show you where the references and possible references are inside a file. It turns the references and possible references into clickable links, making your document look like a webpage with hyperlinks. We like to say Viewport turns your documentation into a wiki ("*wikifies*" the documentation).

NOTE

Possible references are a powerful way to find out if your data is incomplete! Without Viewport's capability to find possible references, it is very difficult to establish which data is missing. Viewport has reports that will make it easy to find Possible references, so you can take action on it. See also:

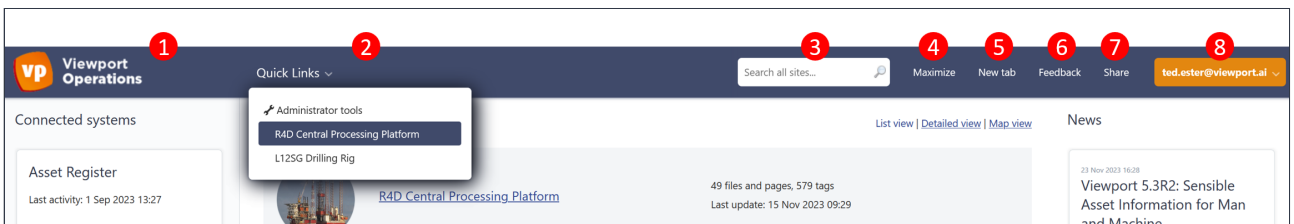
- Showing references and possible references
- References and Possible References panels



General Interface Elements

The Menu Bar

At the top of each page you can find the menu bar.



The following functions are available in the menu bar at the top of the page:

1. **Homepage:** Clicking on the Viewport logo will take you to the home page.

2. **Quick Links:** Clicking on the link will show you the available sites. If you have an administrative role, this is also where you can find the link to the Administrator Tools.
3. **Search box:** You can type in search terms here. For example (part of) a document title, document number, tag number, or any other search term. When searching from the homepage, Viewport will search in all sites and indicate which site the result is from. When you are inside one of the sites, the search will be limited to that specific site. See section [Searching](#) below.
4. **Maximize (or Restore):** Maximize the content pane by hiding parts of the screen. If the page is maximized, this link will change to **Restore**; clicking the link once more will restore to the normal view.
5. **New tab:** Click here to duplicate the current tab in your browser. Handy if you want to view multiple files.
6. **Feedback:** Click on this link to bring up a feedback form to send a comment, ask a question, or report a technical/content problem. If necessary, you can attach documents or screenshots to the form. A link to the current page is included in the e-mail that is sent. The recipient e-mail address cannot be set manually, but is determined by the Viewport configuration.

Search all sites...

Maximize New tab Feedback Share

Feedback/Support Form Minimize

How can we help you?

Type of feedback/support: Select..

Your e-mail will be sent to: Select..

Current page/subject:

Your question or remark:

- I have a comment or question about the current document/page
- I have a technical problem - something is not functioning properly
- I see that some important information was not recognized in the document (false negative)
- I see that something was recognized but it should not have been (false positive)
- I have a general comment or question
- Contact vendor 2nd line support

Attach a file...

Your name/login:

Your e-mail address:

☒ Remember my name/e-mail address

Send comment or question

7. **Share:** Click here to share the URL of the current Viewport page with someone, by entering the email address of the recipient.

Search all sites... Maximize New tab Feedback Share

Share a link

Share link:

Share with: (e-mail address of recipient)

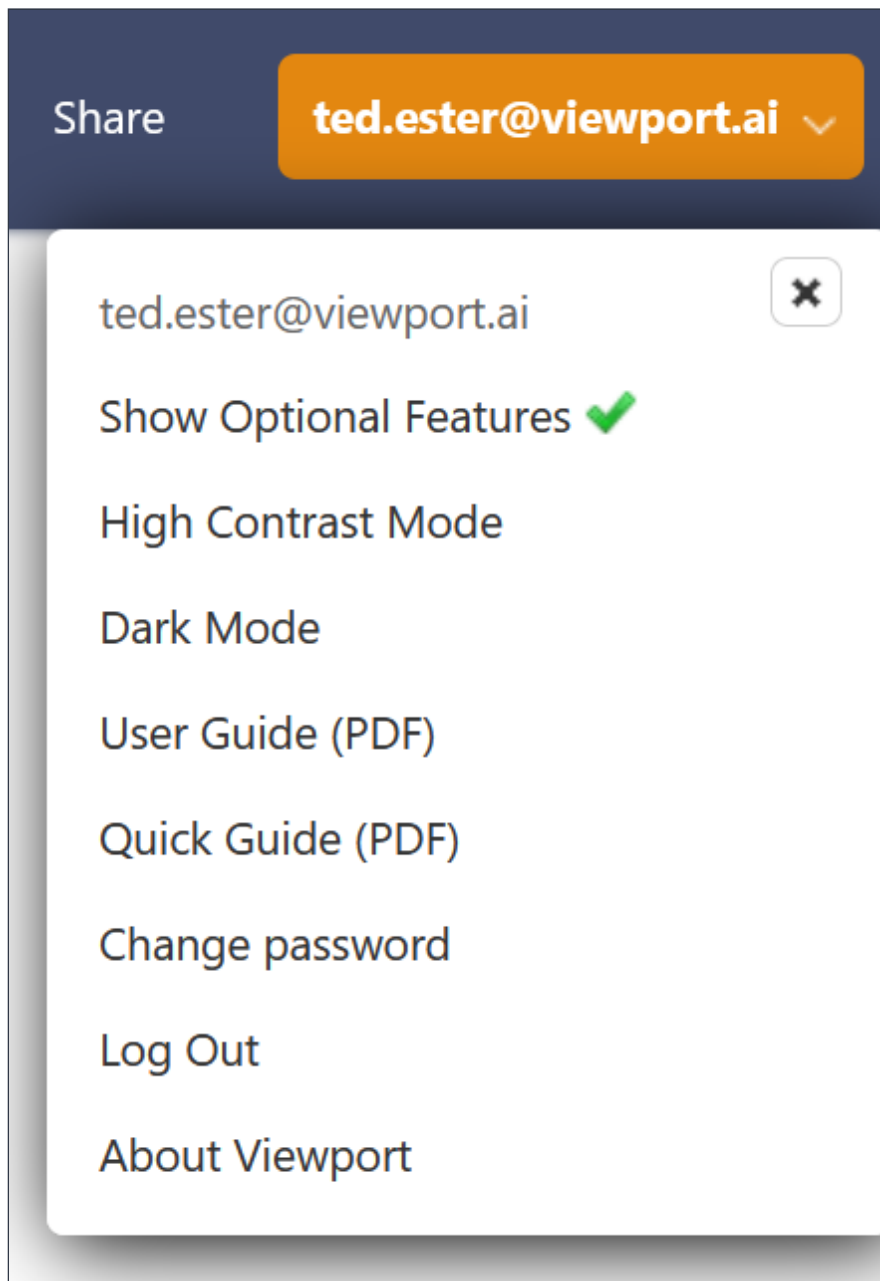
Add a personal message:

Your name or login:

Your e-mail address:

☒ Remember my name/e-mail address

8. **Current user name:** Click on your user name to bring up the user menu:



The menu can differ per role, but has the following possible options:

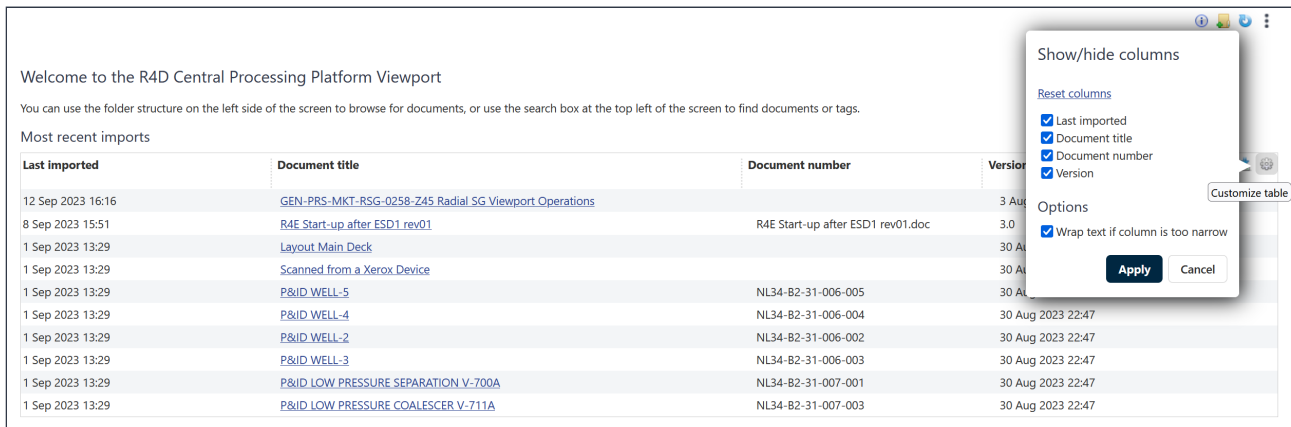
- **Show Optional Features** — If you have an administrative role, clicking on this item will show or hide administrative features. This allows administrators to see the interface the way a regular user does.
- **High Contrast Mode** — Activate this mode if you have color-vision deficiency. When active, this mode adjusts the green/red colors of the interface to provide more contrast for users.
- **Dark Mode**: Activate this mode to use a light-on-dark color scheme, which may be useful when working in the evening or at night.
- **User Guide (PDF)**: Opens the user guide in a new tab.
- **Quick Guide (PDF)**: Opens a short document in a new tab that highlights Viewport functions and different sections in the application for casual Viewport users.
- **Change password** — Click this item to change your password.
- **Log Out** — Click here to log out of Viewport. After clicking, you need to confirm the action. If you choose **Continue to Viewport**, you will return to Viewport with the same user account. This action is not available when

using Active Directory integration.

- **About Viewport:** Displays information about the Viewport instance used like Viewport version, installed plugins, license details and data usage.

The Grid2 Component

Most tables and reports in Viewport are displayed using the Viewport 'Grid2' component, which offers the following features:



Welcome to the R4D Central Processing Platform Viewport

You can use the folder structure on the left side of the screen to browse for documents, or use the search box at the top left of the screen to find documents or tags.

Most recent imports

| Last imported | Document title | Document number | Version |
|-------------------|--|-----------------------------------|-------------------|
| 12 Sep 2023 16:16 | GEN-PRS-MKT-RSG-0258-Z45 Radial SG Viewport Operations | | 3 Aug 2023 22:47 |
| 8 Sep 2023 15:51 | R4E Start-up after ESD1 rev01 | R4E Start-up after ESD1 rev01.doc | 3.0 |
| 1 Sep 2023 13:29 | Layout Main Deck | | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | Scanned from a Xerox Device | | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | P&ID WELL-5 | NL34-B2-31-006-005 | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | P&ID WELL-4 | NL34-B2-31-006-004 | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | P&ID WELL-2 | NL34-B2-31-006-002 | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | P&ID WELL-3 | NL34-B2-31-006-003 | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | P&ID LOW PRESSURE SEPARATION V-700A | NL34-B2-31-007-001 | 30 Aug 2023 22:47 |
| 1 Sep 2023 13:29 | P&ID LOW PRESSURE COALESCER V-711A | NL34-B2-31-007-003 | 30 Aug 2023 22:47 |

Show/hide columns

[Reset columns](#)

- ☒ Last imported
- ☒ Document title
- ☒ Document number
- ☒ Version

Options

- ☒ Wrap text if column is too narrow

Apply Cancel

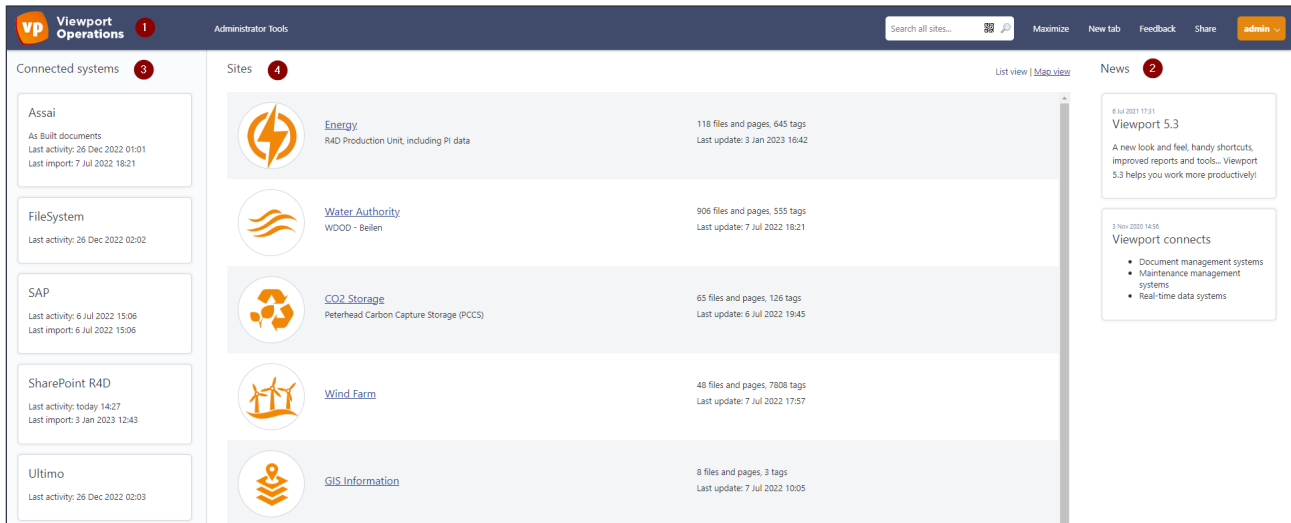
- **Resize columns:** when hovering the cursor on the dotted line between two table headers, you can resize columns
- **Filter values in columns:** when hovering the cursor under the table header, an input appears where you can type in a value to filter on (show only rows containing your filter input)
- **Sort by column:** click on a column header to sort by the values in that column. Click once more to sort by descending values, and once more to reset sorting.

When hovering over the table header section, two icons appear:

- **Download:** click this to download the (filtered) rows to a comma-separated value (CSV) file.
- **Cog:** click this to see table options:
 - **Reset columns:** resets column selection to the default, and resets column widths.
 - **Select columns:** here you can select which columns you want to see in the grid view. This may include columns that are not visible by default.
 - **Wrap text if column too narrow:** check this to show all text, instead of showing "...". The maximum is 3 lines of text.

The Viewport Homepage

When you navigate to the Viewport web address, it opens the Viewport homepage. You can always return to the homepage by clicking on this icon in the upper-left corner of the page.



1. **Homepage:** link to return to this page

2. **News:** News items that a Viewport content administrator has added.

3. **Connected Source Systems:** Source systems connected to Viewport are shown here. You can see the last time the connector was active synchronizing the content ("Last activity") and the last time an item from this source was imported into Viewport ("Last import"). See also [About various dates and times \(timestamps\)](#) above.

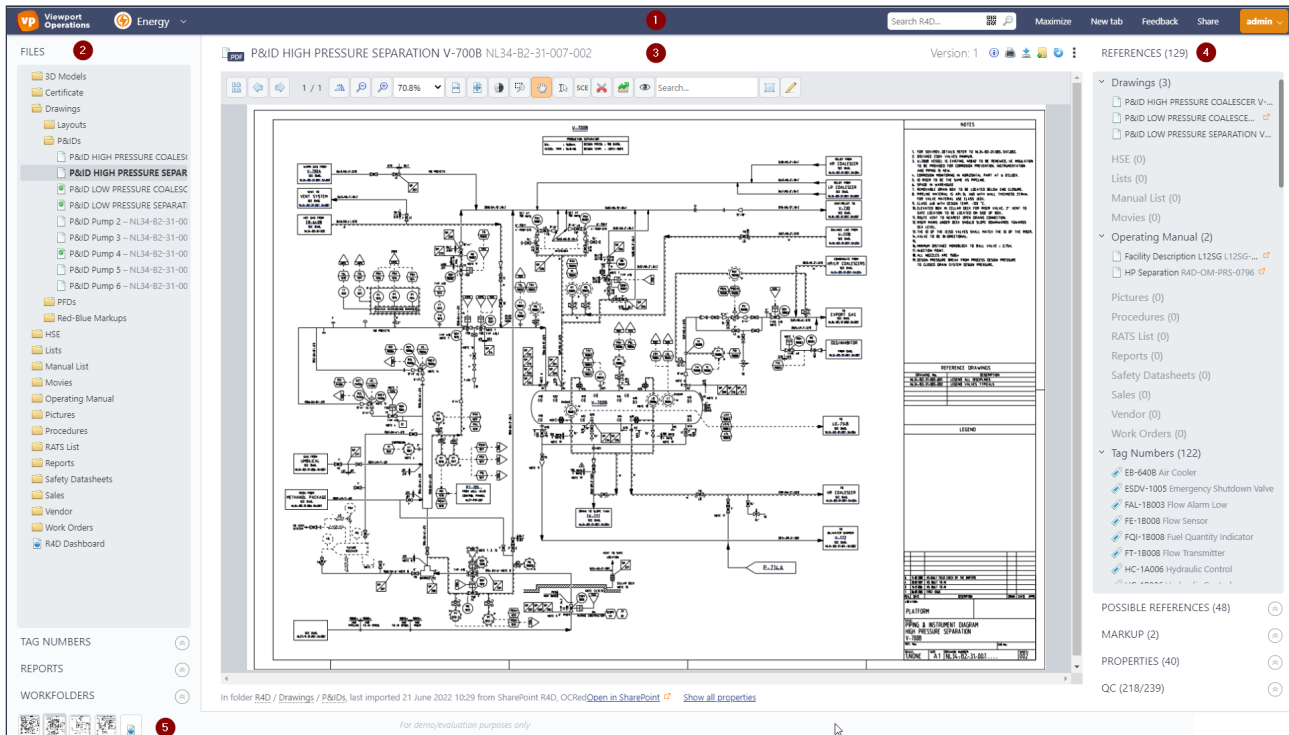
4. **Sites:** Overview of all sites that are available to you in Viewport. Some sites may be hidden, or invisible because you do not have permissions to view them.

NOTE

The content administrator can hide some sites or source systems, so these lists may not be complete.

Standard Page Layout for Sites

Pages in Viewport typically consist of five main sections, as shown in the figure below:



1. Menu bar

1. **Homepage:** You can return to the homepage by clicking the icon in the upper-left corner of the page.

2. **Site selector:** The site selector shows the name of the current site. It can be used in two ways:

- Clicking on the current site name will take you to the site "Welcome" page.
- Clicking on the small downward arrow will show a list of sites that you can navigate to. This eliminates the need to go to the starting page first.

2. Tree Pane

The Tree pane contains a folder-tree structure that contains all documents and tags within the current site.

For more information on how to navigate using the tree pane, see section [The Tree Pane](#).

3. Content Pane

The Content Pane can display various kinds of information such as information about tags, documents, search results, web pages, and so on. Additional information may be available, depending on the item that appears in the pane. See [The Content Pane](#) for more details.

4. Reference Pane

The Reference Pane's primary purpose is displaying the references and possible references of the current tag/document. It has a number of subsections (panels):

- **References** and **Possible references** panels: shows where the current item is mentioned and what is mentioned inside the currently viewed item. References are categorized automatically similar to the Tree Pane. The number of references per category is shown behind each category. The concept of possible references is unique to Viewport and tell you which text looks like a tag number or document number, but for which no corresponding tag or file can be found. These items may be missing in the source systems connected to Viewport. See also [References and Possible References panels](#).
- The **Versions** panel is shown whenever multiple versions and/or renditions of a file are available in Viewport. You can see the various files and by clicking on a version, the selected document's version is loaded into the viewer. If it is not the latest version of the file, a warning appears top right above the document viewer mentioning that a newer revision is available. By clicking on the label you will go to the latest version automatically.
- The **Markup** panel is for end users that work with technical data and often have the need to add corrections, planned changes, work activities and comments to existing documents and drawings. For this purpose, Viewport supports adding markups to files and enables you to download or print the markup. This functionality is available in the Markup panel, explained in more detail below in [Working with Markup](#).
- The **Properties** panel
- The **QC** panel is visible only for Content Administrators. This is where administrators can indicate whether the found references or possible references are valid or not.
- The Reference Pane can also contain **custom panels**. These are added depending on the currently viewed item and can be added by plugins (such as real-time data or a subset of the item metadata).

5. History

This section presents a history of pages and items that have been visited in the current browser session. The most recently viewed item is shown on the left-most side.

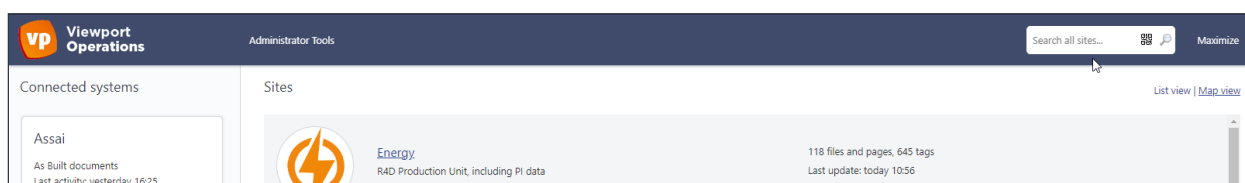
NOTE

The History section is cleared as soon as you leave (or refresh) the page. You can use your browser history (the Back and Forward buttons) to navigate to previously viewed items.

Searching

In Viewport, you can search for information at three different levels:

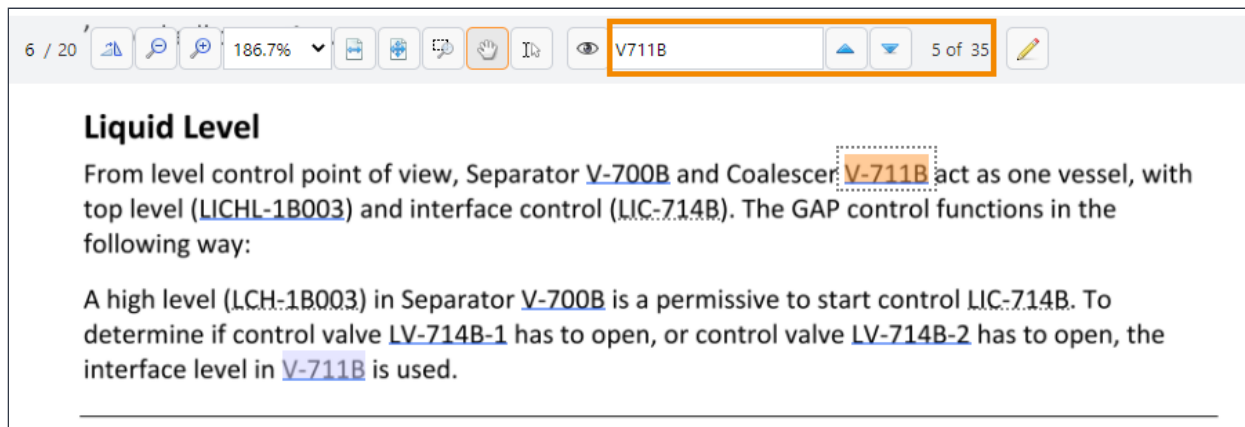
1. **Search all sites:** From the Viewport homepage, the searchbox in the menu bar allows you to search across all sites:



2. **Search within a site:** If you have navigated to a particular site, the searchbox in the menu bar is limited to searching within that site only. This screenshot shows the searchbox in demo site "R4D", as indicated by "Search R4D..." inside the searchbox":

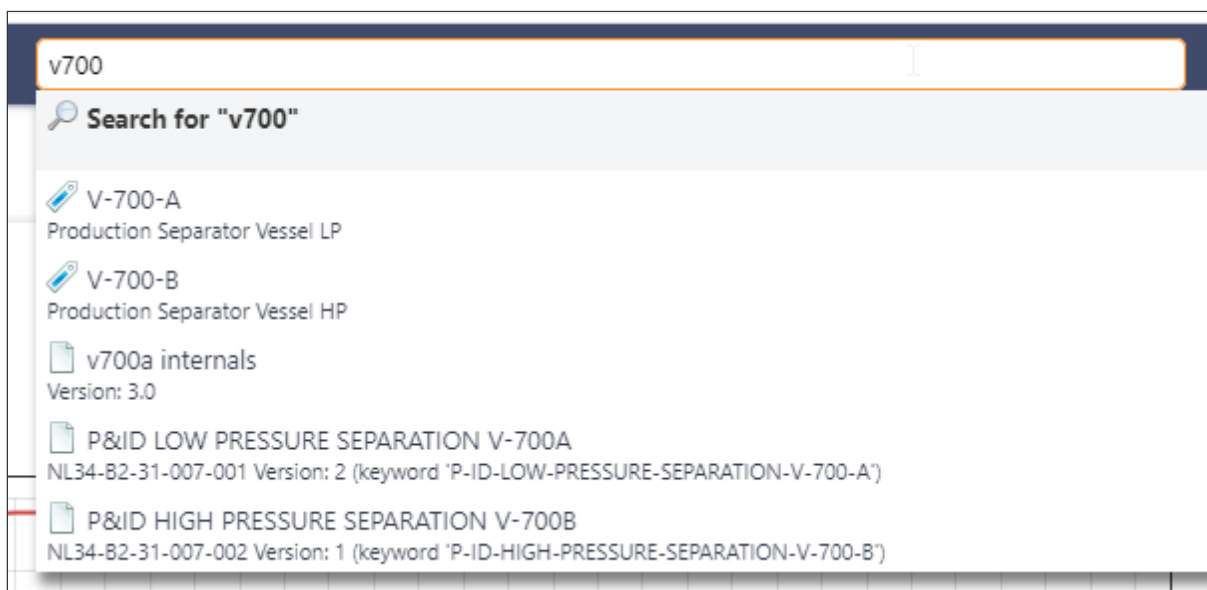


3. **Document search** to search within the currently viewed document. This is explained in section [Search within a document](#).



Searchbox and Autocomplete

If you type your search term into the searchbox and wait, a list of suggestions comes up.



As Viewport is commonly used in industrial environments, this "Autocomplete" dropdown has a number of features that make it easier to find document numbers and tag numbers:

- **Flexibility:** Term 'v700a' will find items such as 'v-700-a', 'V700A', 'V.700_A', and so on.

- **Prefix search:** Term 'v70' will find items such as 'v-70', 'v-700', 'v-701', 'v-700-a', and so on.
- **Possibility to skip parts:** Term 'rsg 10' contains a space, indicating that we can skip parts and find items like 'RSG-PRO-SAL-RSG-10021' (that contains a part 'rsg' as well as a part starting with '10')

This screenshot shows the types of hits for search term 'v700'.

In case of a result closely matching the entered text -- for example if you have typed in "v700a" and autocomplete returns tag "V-700-A" -- that item will be selected by default. Pressing Enter will take you to the tag number directly.

Search results

If you have entered a search term and select the option 'Search for...' (which is the default option if your term does not match any items directly), pressing Enter will take you to the search results page.

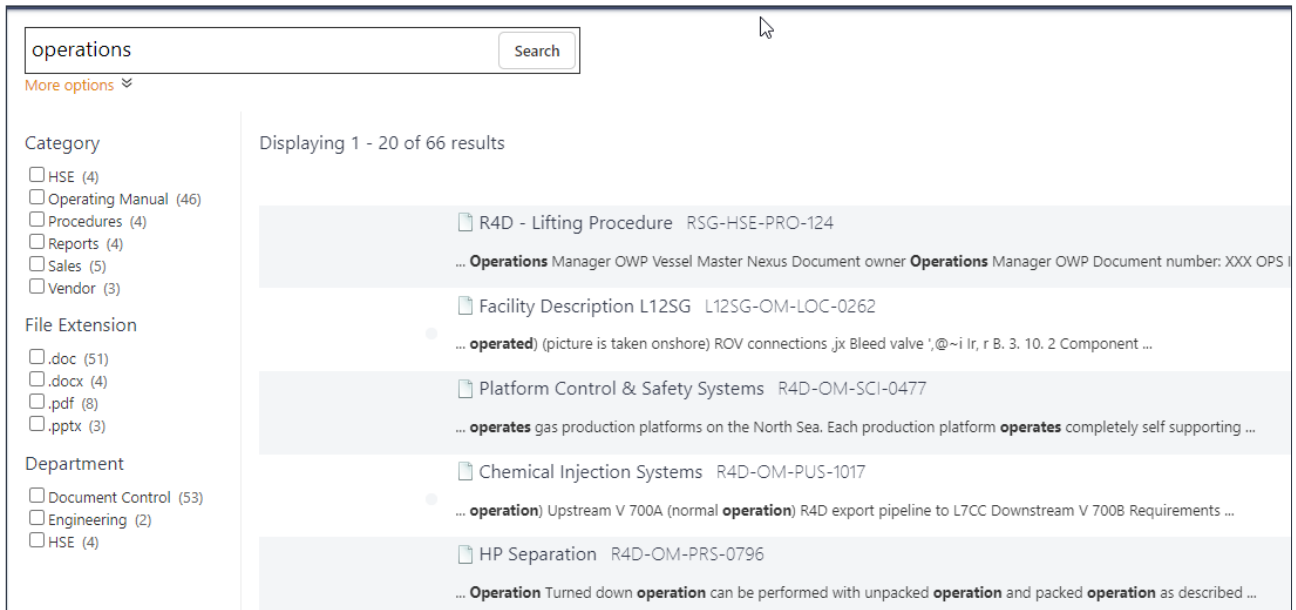
The screenshot shows the Viewport Operations search interface. At the top, there is a search bar with the text 'v700' and a 'Search' button. Below the search bar, there is a 'More options' dropdown menu. The main content area displays 'Displaying 1 - 20 of 165 results'. On the left, there is a 'Category' sidebar with a list of categories and their counts: [Empty] (2), Data Sheets|Fire, Safety..., Data Sheets|Processing..., Drawings|Layouts (2), Drawings|P&IDs (12), Geen waarde gekozen|..., Lists (2), Marine Requirements|S..., Miscellaneous|Design B..., Miscellaneous|Geotech..., Miscellaneous|Lists, Ind..., NOGEPa (1), and OMAE Seminar Integr... On the right, there is a table of search results. The table has two columns: 'Site' and 'Result'. The results are grouped by site: LPT, R4D, and R4D. Each result entry includes a file type icon (e.g., Process Overview, Produced Water Treatment), a file name, and a context string.

| Site | Result |
|------|---|
| LPT | Process Overview R4D-OM-PRS-0791 ... V 700 Produced Vi'ater Flash Drunt DS 701 rrarer ~ +M SI ~III |
| R4D | Process Overview R4D-OM-PRS-0791 ... V 700 Produced Vi'ater Flash Drunt DS 701 rrarer ~ +M SI ~III |
| R4D | Produced Water Treatment R4D-OM-PRS-0798 ... V 700 I Soa Snmp X 710 Prod ac ed Vfat er Flank Drum DS. 70 |

The search results are presented on a new page, with the most relevant result at the top of the list. If you are searching from the homepage, the first column of the search results ("Site") states which site the search result is from. The second column shows the search result name/alternative name, file type icon (if applicable) and the context in which the search term was found (if applicable).

The search results are combined results of Viewport's various search algorithms.

- **Keyword search:** Viewport will try to match the search term with items in the database, similar to what the Autocomplete dropdown shows. Anything that is found is added to the 'keyword hits'.
- **Range search:** Viewport will try and detect ranges like "V700A through C", "V700A..C" or "V700A/B/C" and add results to the 'keyword hits'.
- **Reference search:** All the items from the 'keyword hits' are used to search for documents and data containing the 'keyword hits'.
- **Full-text search:** The search term is not only searched for literally, but also using (language specific) variations. For example, search term "operations" will also search for "operations", "operation", and "operating".



The left-hand side of the screen shows **facets**, attributes that you can toggle on/off to further narrow down the search results. In this case, the facets shown are:

- **Category:** select one or more categories (folder names) to restrict the search results to items in the selected folders.
- **File Extension:** select one or more file extensions to restrict the results based on the matched document's file extension
- **Department:** select one or more departments to show only documents whose 'Department' property is one of the selected departments.

NOTE

Facets can be configured by a Content Administrator, so the facets in your Viewport instance can be different from the facets shown here. If you want to have the ability to filter on other facets, contact your administrator!

Search tips:

- **Phrase search:** normally, words in the search term do not have to be next to each other in a document. For example, searching for 'high pressure' (without quotes) will also return documents that contain the word 'high' on page 1 and the word 'pressure' on page 2. If you want the words to be next to each other, you can enclose the search term in double quotes which will do a *phrase search*: '"high pressure"'.
 - 'high or low': finds documents containing either the word 'high' or 'low'.
 - '"high pressure" or "low pressure"': finds documents containing the phrases 'high pressure' and/or 'low pressure'.
- **Exclude words:** you can further finetune the search results by leaving out items that contain a specific word. You can do so by adding a minus followed by the term you do not want in the document: 'high -pressure'.

Excluding words does not work across 'or', so you need to repeat excluded words if you use 'or':

- o "high pressure" -coalescer or "low pressure" -coalescer'

NOTE

Some limits apply:

- **Range search:** Viewport limits *range search* to a maximum of 100 items; for example searching for "tt100 through 999" will search only for "tt100" up until "tt199".
- **Search results:** Viewport limits search results to a maximum of 500 items; if you see 500 results, there can be more results that you can access by specifying more search criteria.

Sites

This section describes the various pages and page sections ("panes") you find inside a site:

- The "Welcome" page or customized landing page
- The standard page layout, consisting of 3 panes
- The Tree pane
- The Reference pane
- The Content pane

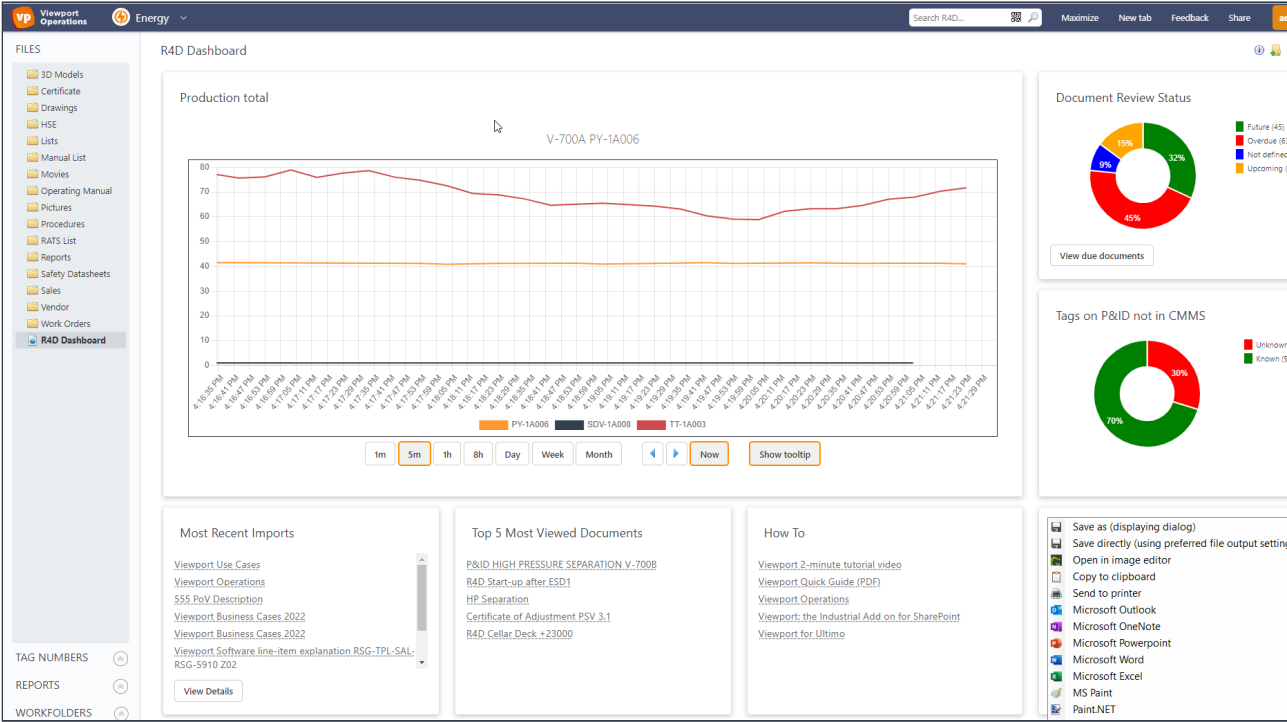
The "Welcome" Page

This is the first page that appears after clicking on a site, and it presents site-specific information, the site image (if present), and the most recent updates in connected source systems. All the content, such as files, tags, reports and workfolders, appear on the left-hand side in a folder structure called the *tree pane* explained below.

The screenshot displays the 'Landing Page Test' interface in Viewport Operations. The top navigation bar includes a search box, 'Maximize', 'New tab', 'Feedback', 'Share', and an 'admin' user profile. The left sidebar, titled 'FILES', contains a tree view with folders like '3D Models', 'Certificate', 'Drawings', 'HSE', 'Lists', 'Manual List', 'Movies', 'Operating Manual', 'Pictures', 'Procedures', 'RATS List', 'Reports', 'Safety Datasheets', 'Sales', 'Sprint', 'Vendor', and 'Work Orders'. At the bottom of the sidebar are sections for 'TAG NUMBERS', 'REPORTS', and 'WORKFOLDERS'. The main content area features a 'Welcome to the Landing Page Test Viewport' message and a 'Most recent imports' table.

| Last imported | Document title | Document number | Version |
|-------------------|--|--------------------------|-------------------|
| 3 Jan 2023 12:43 | Viewport Use Cases | | 2.0 |
| 3 Jan 2023 12:42 | Viewport Operations | GEN-PRS-MKT-RSG-0258-Z44 | 14.0 |
| 3 Jan 2023 12:36 | SSS PoV Description | RSG-PRO-PRJ-RSG-5870 | 3.0 |
| 3 Jan 2023 12:35 | Viewport Business Cases 2022 | RSG-PRS-SAL-RSG-5979-R03 | 4.0 |
| 3 Jan 2023 12:35 | Viewport Business Cases 2022 | RSG-PRS-SAL-RSG-5979-R03 | 4.0 |
| 3 Jan 2023 12:34 | Viewport Software line-item explanation RSG-TPL-SAL-RSG-5910 Z02 | RSG-TPL-SAL-RSG-5910 Z02 | 2.0 |
| 20 Dec 2022 08:33 | Demo File - VP | RAD-PR-PRS-2996 | 99.0 |
| 23 Nov 2022 12:04 | Test Certificate | | 5.0 |
| 21 Sep 2022 17:17 | Test alternative | | 3.0 |
| 6 Jul 2022 19:20 | RSG-ID-000456-100-M58-01 | | 21 Jan 2022 10:45 |

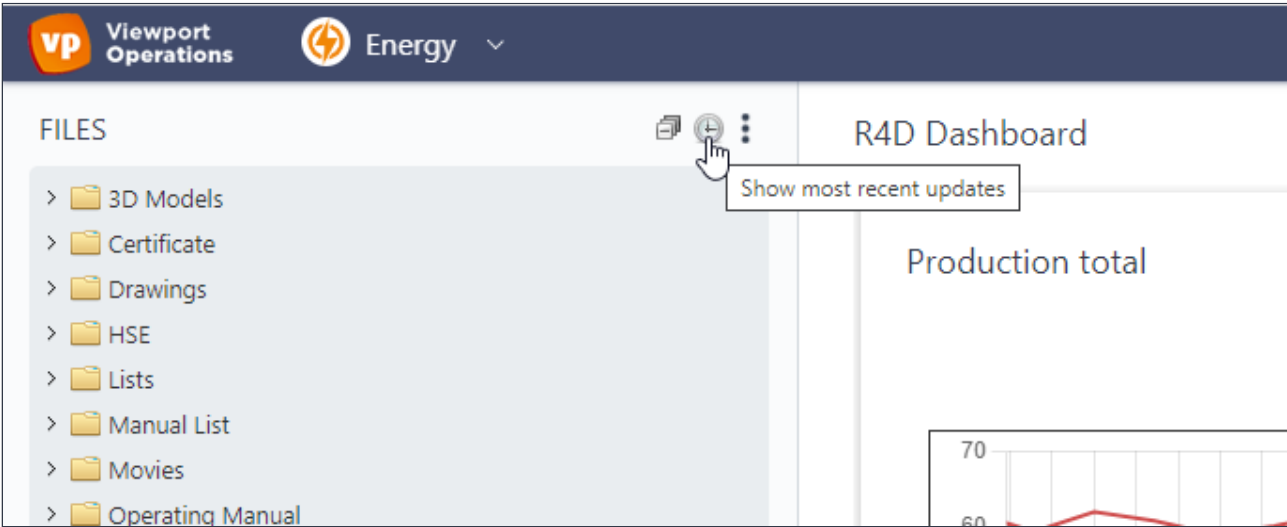
The "Welcome" page can be customized by a Viewport Content Administrator, (here called a customized landing page) so it may look different for you. The following example shows a couple of reports, a list of the most viewed documents and a real-time data graph:





The Tree Pane

The Tree Pane shows you the site content in a categorical drill-down fashion. The structure and arrangement of the tree pane may differ between sites. It is possible to have multiple trees to choose from -- this can be configured by a Content Administrator. Usually there is a tree for **Files** and a tree for **Tag Numbers**.

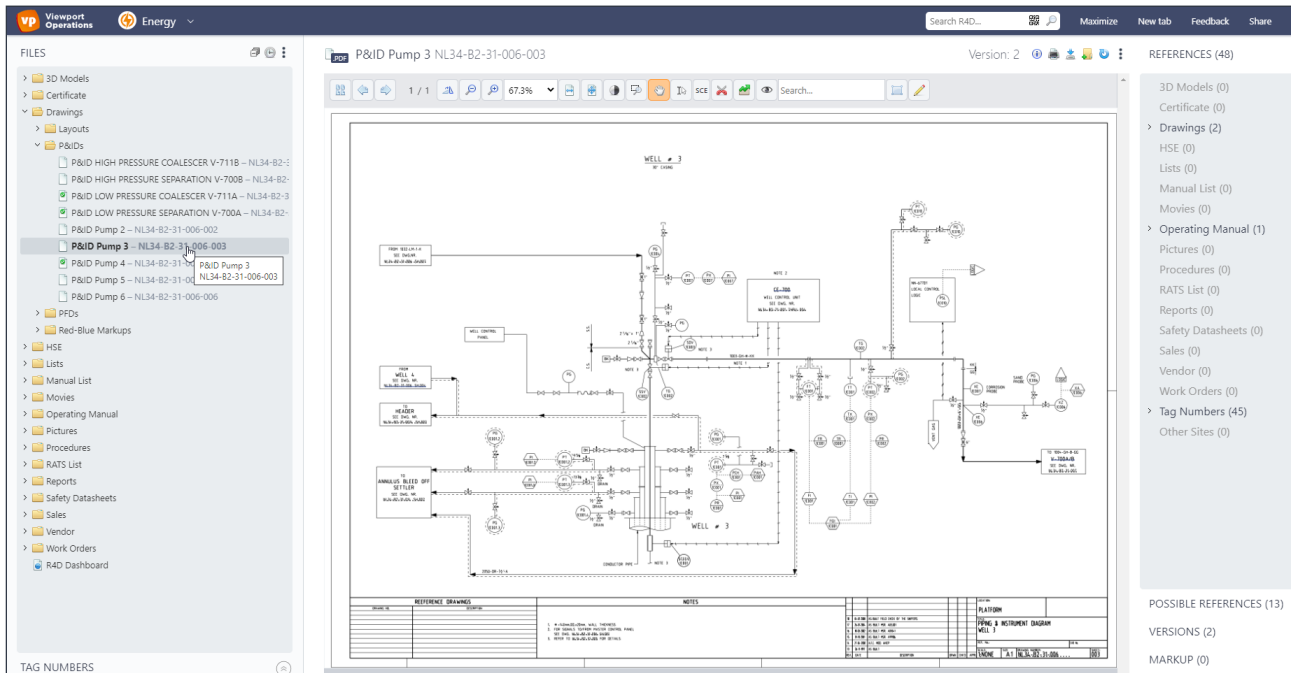
The figure below depicts the **Files** tree structure for a demo site named "R4D".



When hovering over the tree pane, additional controls become visible:

- Use the small  symbol in front of folders to **open or close folders**
- The  icon can be used to **close all opened folders** at once.
- The clock icon shows you **recently imported files**.
- The icon with the **three dots** will show you options for customizing the tree view.

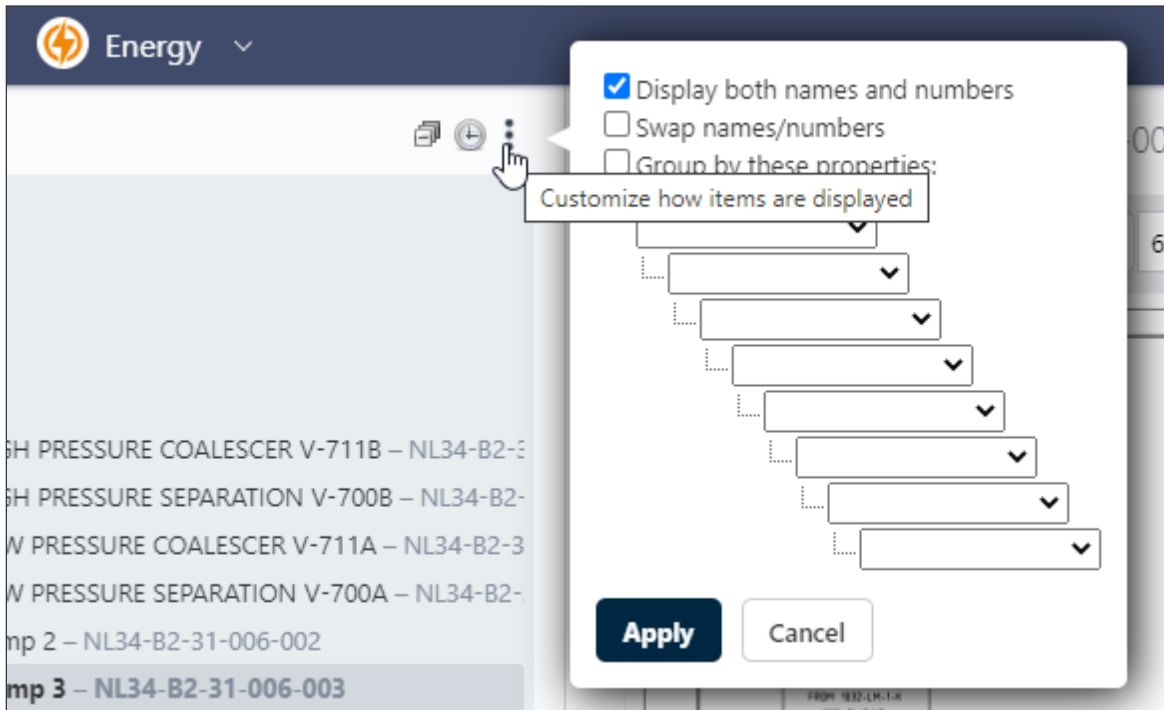
As explained in the section [Name, Alternative Name and Version](#), published items have a **name** and **alternative name**. If you hover over a document or a functional location (tag number) in the tree pane, you can see the name of the item and the alternative name below it.



The screenshot displays the Viewport Operations Energy software interface. The main window shows a P&ID diagram titled "P&ID Pump 3 NL34-B2-31-006-003". The diagram includes various process elements like pumps, valves, and tanks, with labels such as "WELL # 3" and "WELL # 1". The left pane, titled "FILES", shows a tree structure with folders like "3D Models", "Certificate", "Drawings", "Layouts", "P&IDs", "PFDs", "Red-Blue Markups", "HSE", "Lists", "Manual List", "Movies", "Operating Manual", "Pictures", "Procedures", "RATS List", "Reports", "Safety Datasheets", "Sales", "Vendor", "Work Orders", and "R4D Dashboard". The right pane, titled "REFERENCES (48)", lists various references including "3D Models (0)", "Certificate (0)", "Drawings (2)", "HSE (0)", "Lists (0)", "Manual List (0)", "Movies (0)", "Operating Manual (1)", "Pictures (0)", "Procedures (0)", "RATS List (0)", "Reports (0)", "Safety Datasheets (0)", "Sales (0)", "Vendor (0)", "Work Orders (0)", "Tag Numbers (45)", and "Other Sites (0)". Below the references, there are sections for "POSSIBLE REFERENCES (13)", "VERSIONS (2)", and "MARKUP (0)".

Customizing a Tree

A tree that is shown in the Tree Pane can be customized by the clicking on the three dots:



Options to customize the tree are:

- **Display both name and alternative name:** Uncheck this box to display names only.
- **Swap name/alternative name:** Check this box if you want to display the alternative name first, name second
- **Group by these properties:** Documents can be grouped according to their properties. This is explained below.

Grouping by properties

Items in a tree are shown using a folder structure. For *files*, this structure is based on a property called "Category". This property is usually provided by a connector using an existing folder structure, for instance a network share or a folder structure in SharePoint.

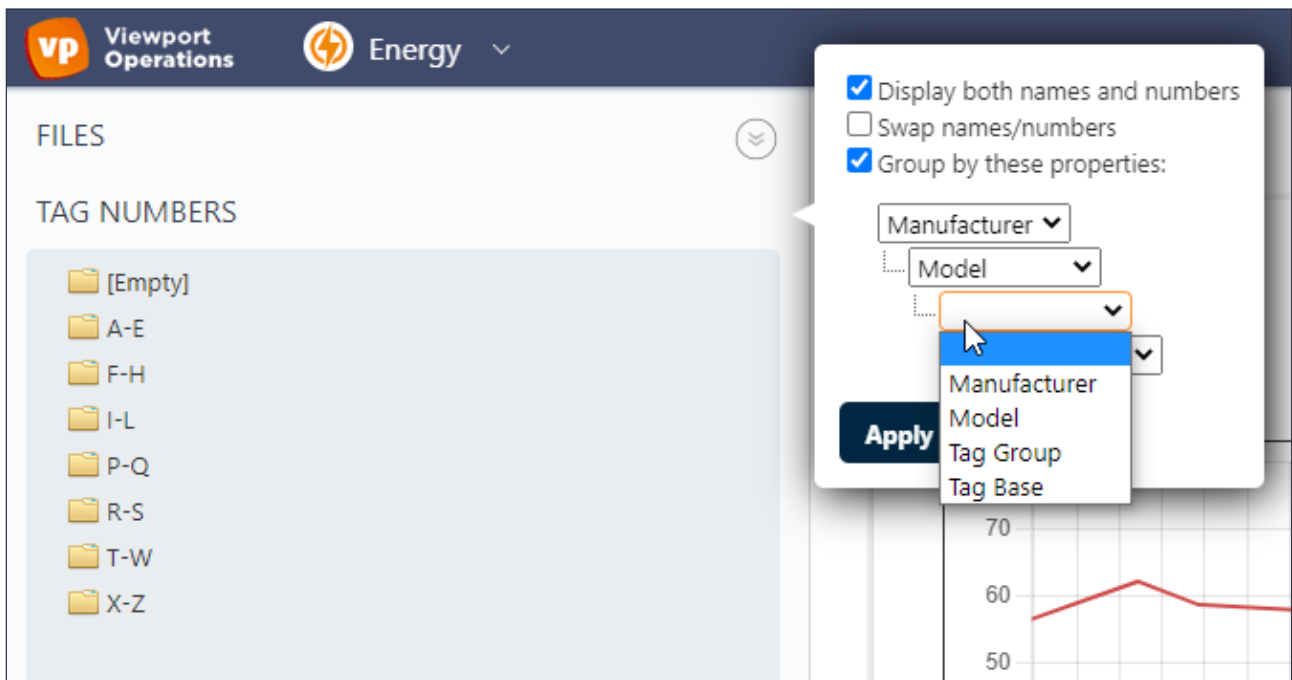
In contrast, *tag numbers* are shown in a folder structure that is based on the tag number:

- The first level is formed by group names, such as "A-E", a property called the "Tag Group".
- The second level is formed by tag prefixes, such as "ESDV", a property called "Tag Base". Viewport automatically derives this property (as well as the "Tag Group" property) from the first group of letters in the tag number.

If you want to see a different structure, you can customize a tree using the option **"Group by these properties:"**. For example, you can:

- Group documents by "Company", then by "Department", then by "File extension".
- Group tags by "Manufacturer", then by "Model".

The select boxes below heading "Group by these properties:" can be used to choose the first, second or lower level of the tree structure.

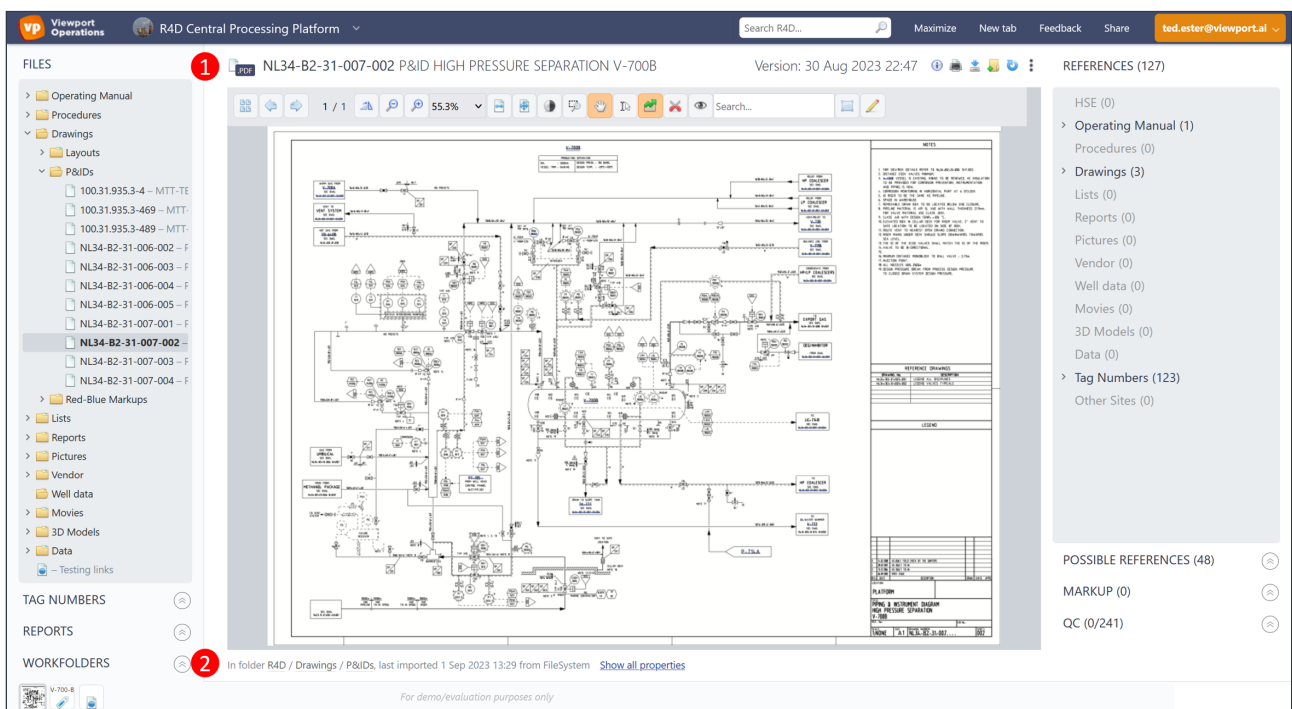


As soon as you make a selection, the checkbox before "Group by" is checked. If you un-check the checkbox, the options are reset and the view reverts to its original structure.

The Content Pane

The content pane is the center section of the page layout. This is where you can view a file, a functional location, a report, and so on, each type of item having its own viewer. These viewers are explained in the next sections.

The following image shows the Content Pane in more detail, when viewing a file:



1. **Viewer Header:** the Viewer Header section shows the name, alternative name and version of the currently viewed item, as well as context-specific actions.
2. **Viewer Footer:** the Viewer Footer section shows details about the currently viewed item, as well as access to more details (in the [Properties Popup](#)).

The Viewer Header

In the **Viewer Header** you will find the name and alternative name of the currently viewed item, as well as the version. For files, a small icon with a text label indicates the file extension, such as ".DOC" or ".PDF".



TIP

See section Name, Alternative Name and Version for more information

The version that is shown depends on what version information has been supplied by the source system:

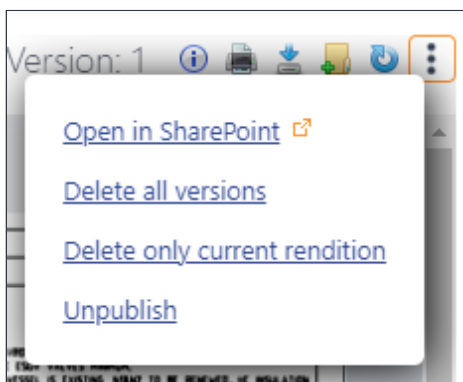
- If the source system has provided a **version for display**, Viewport will use that.
- Next, Viewport will examine the item's **external version ID**. If that is not empty, Viewport will use that.
- Finally, Viewport will use the item's **last write time**.

NOTE


If the version that Viewport uses looks like a date/time, for example '2023-11-23T23:59:59Z' or '00638363843990000000' (which is a so-called 'C# ticks' string, padded to 20 digits), then Viewport will show the version as a formatted date/time such as "23 Nov 2023 23:59". You can always check the original (unformatted) version string in the Properties Popup by hovering over the "Version" property, or by looking at the "External Version ID" property.

Context-specific actions

Besides name and alternative name, the Viewer Header also contains a list of context-specific actions. The list can be different based on the type of item that you are viewing, as well as whether you have an administrative role or not.



The context-specific actions include:

- **Show all properties:** Click on the  icon to show all properties of the item you are currently viewing. This will be explained in section [Properties Popup](#) below.

- **Print** (for files only): Click on the Printer icon to open the file in the default PDF Viewer and automatically trigger the print dialog.
- **Download PDF** (for files only): Click on the Download icon (with the blue downward arrow) to download a PDF version of the file. This may include a [watermark](#).
- **Add to workfolder:** Add the currently viewed tag or file to a workfolder. *Note: This requires the Workfolder module, so it may not be visible for you. See section [Workfolders](#) for more details.*
- **Synchronize now** (for administrators only): If an administrator makes a change in configuration that influences a lot of different files in the database, the files are updated silently in the background, which can take some time. To process the changes for the currently viewed item faster, an administrator can click "Synchronize now" to reapply the changes and see the results directly.
- **More actions:** If there are more actions available than can be shown, clicking on the three dots will bring up a menu with additional actions. In the screenshot above you can see "Open in SharePoint" (which is added by a plugin), as well as three administrator-only actions ("Delete all versions", "Delete only current rendition" and "Unpublish").

! INFO

About PDF watermarks

A Content Administrator can add watermarks to downloaded PDF files, for example to add "Uncontrolled Copy" or the date/time of the download. This is configurable system-wide. Once a watermark is configured, you can't download (or print) a PDF version of the file without that watermark.

The Viewer Footer

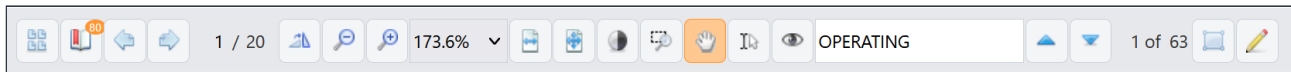
The Viewer Footer shows:

- Where an item is located in the default folder structure (the path). You can click on any part of the path to open that particular folder.
- When the item was last imported by Viewport (i.e. the Last Import Time, not the Last Write Time that indicates when it was last modified in the source system)
- The name of the source system
- Whether the 'Optical Character Recognition' (OCR) process was run on the item (in which case the footer shows "OCRed")
- A link to show all properties (see [Properties Popup](#))
- Optionally, links added by plugins, for example to open or edit the file in SharePoint, or to open a tag number in the maintenance management system (both of which requires login credentials for these systems to view/edit).

The Document Viewer

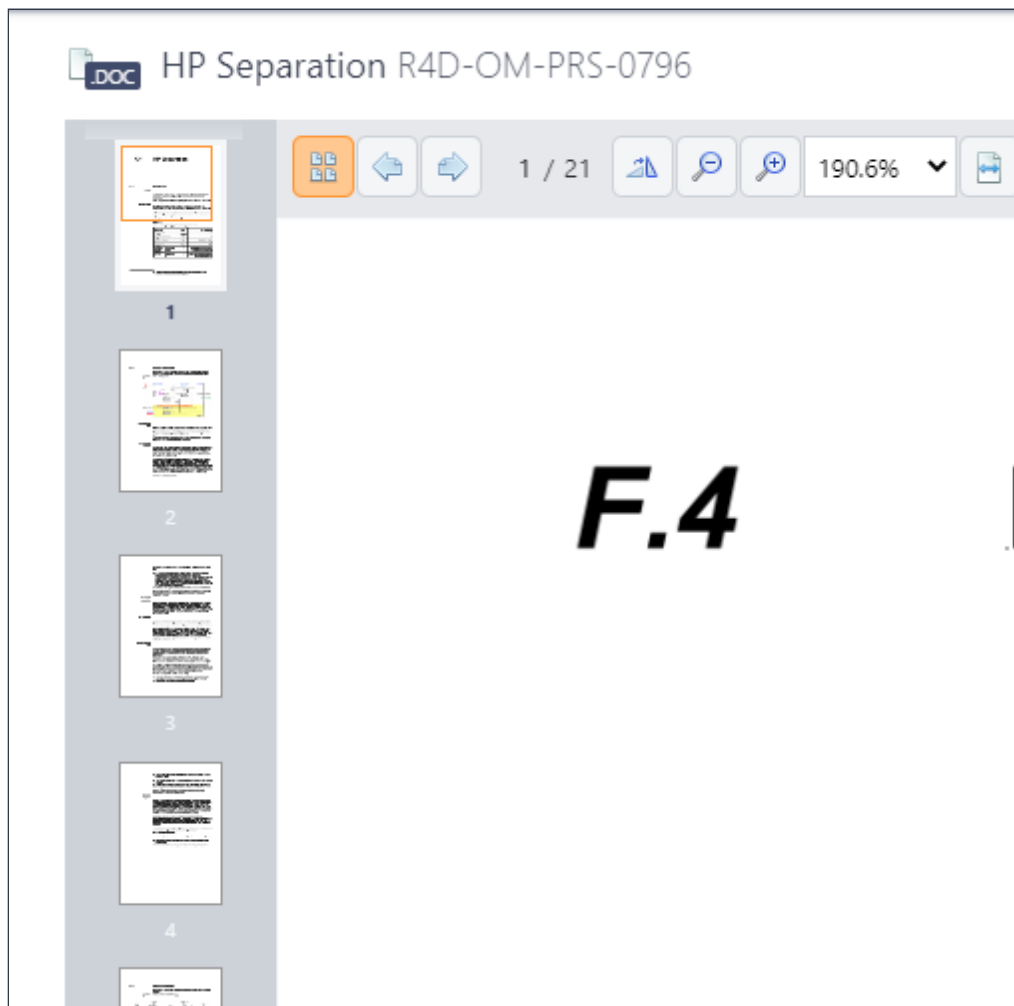
When viewing a file that is in PDF format, or in a format that Viewport could convert to a PDF, it can be viewed using the built-in **document viewer**.

The document viewer has a toolbar that offer features to navigate through a document, show or hide additional information, search and (for content administrators) make certain changes to it.



The buttons in the toolbar are from left to right:

- **Show/hide thumbnails:** Thumbnails can be useful when you want to find an image or a graphic within a lengthy document without the need to look at each page.



You can also use the thumbnail view to move around a large page, such as an A1 format P&ID, by dragging the orange outline in the thumbnail.

- **Show/hide bookmarks:** For Word or PDF documents that contain bookmarks (links to sections), you can click on this button to show an hierarchical listing of bookmarks (in this case there are 80 bookmarks). You can click on a bookmark to jump to the bookmark in the file. If the file does not have any bookmarks, this button is not shown.
- **Previous page** and **next page** buttons
- **Current page/total page count:** you can manually change the current page number to jump to a specific page.

- **Rotate right** (Ctrl+right arrow): rotates the currently viewed page 90 degrees to the right. A keyboard shortcut (Ctrl+left arrow) is available for rotating the currently viewed page 90 degrees to the left. See the note below about rotated pages.
- **Zoom out** (Ctrl+minus) and **zoom in** (Ctrl+plus): zoom out or in
- **Current zoom level** dropdown: you can change the zoom level using the dropdown, from 10% to 1200%. You can also choose option "Fit width" and "Fit page" (also provided as separate buttons, see below).
- **Fit width**: adjust the zoom level so that the page width takes up the available viewer width.
- **Fit page** (Ctrl+0): adjust the zoom level so that the entire page takes up the available viewer width and height.
- **Black/white mode**: renders the page in black/white mode. This is useful for some CAD formats, if you have light colors (such as yellow) on a white background.
- **Region zoom** (Z): allows you to select (by dragging) a rectangular area on the page, and adjusting the zoom level so that the region takes up the available viewer width / height. This is handy for quickly zooming in on e.g. title blocks or other areas of interest.
- **Pan mode** (Space): this is the default mode, when selected you can drag the page by clicking and dragging the mouse. You can also keep space pressed to go into 'pan mode' temporarily.
- **Select mode** (T): this mode allows you to select text by clicking and dragging. You can then use Ctrl+C to copy the selected text to the clipboard. When in Select Mode you can also use Ctrl+A to select all text in the document (and copy it using Ctrl+C).
- **Highlight shapes and references** (E): This 'eye' button allows you to show the references, possible references and shapes in color coding. See [Showing references and possible references](#) below for more information.
- **Search** (F): search within the current document. Note that this does not search in *other documents*, to do that you have to use the main Viewport searchbox at the top of the page.
- **Search-related controls**: If you have entered a searchterm, here you can see how many hits are found (if any), which hit is currently highlighted, and previous/next buttons to cycle through the hits, or press Enter when the searchbox is focused.
- **Edit shapes** (R, Content Administrator only): explained in the administrator guide.
- **Edit markup** (M, Markup module only): This is explained below in section [Working with Markup](#).

You can also use the keyboard arrows and page up/page down to navigate through the document.

TIP

If you find that keyboard shortcuts, such as Ctrl+A (select all) or Ctrl+C (copy selected text) are not working, click inside the document first to focus it, and retry.

NOTE

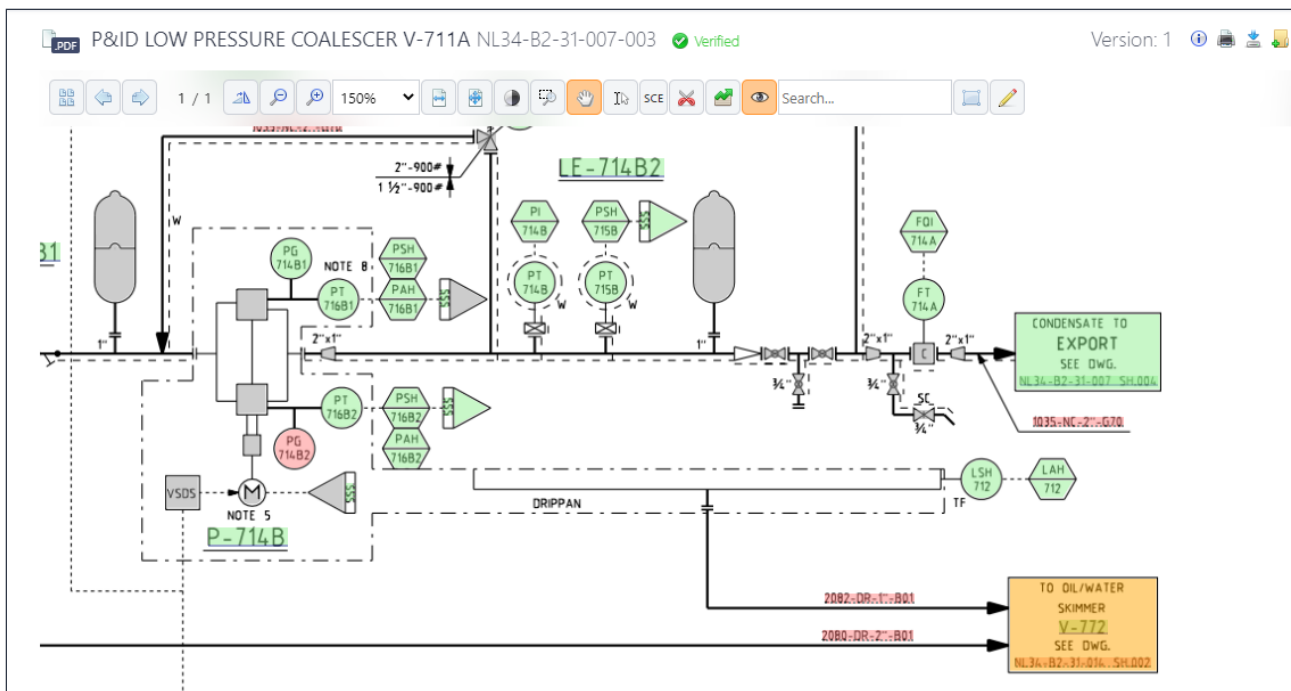
When changing the page rotation, this is saved in your current login session, so going back to the same document and page will show the page in the last rotation.

If you are a content administrator, rotating the pages affects the *default rotation* for that page for all Viewport users, so you can fix individual pages that have been imported using an incorrect rotation.

Showing references and possible references

Clicking on the "eye" icon will show references, possible references and detected shapes using color coding.

- **Green** shapes and text indicate a reference, for example a tag number that corresponds with an imported functional location, or a document number that corresponds with an imported document.
- **Red** shapes and text indicate a possible reference (candidate), for example a tag number that does not correspond with any imported functional location.
- **Orange** shapes and text indicate a combination of a reference and a possible reference, for example "TT-100-A/B" where TT-100-A is a reference (existing functional location) but TT-100-B is a possible reference (no such functional location imported).
- **Grey** shapes indicate that a shape without any reference or possible reference.



In the figure above we see:

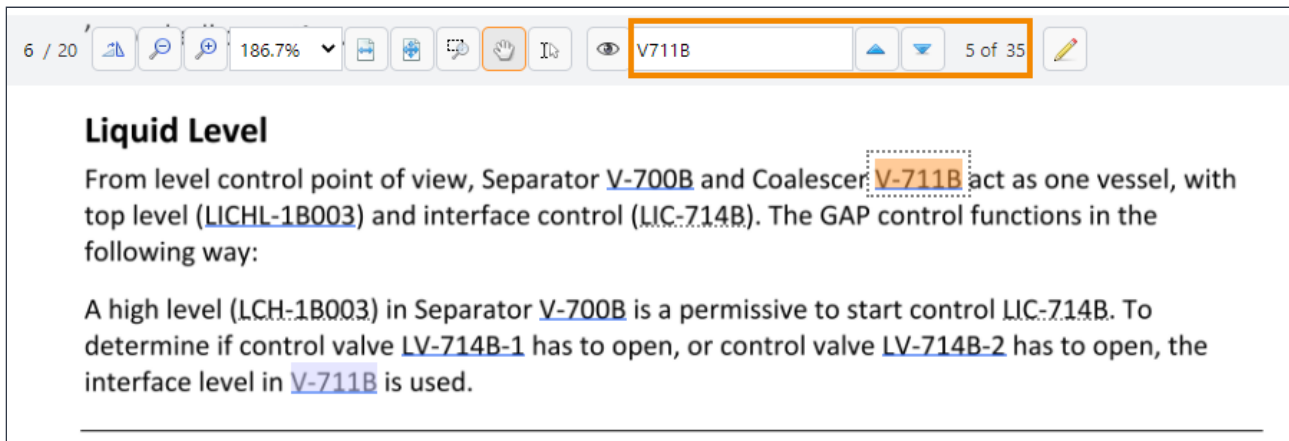
- A red circle contains tag number **PG-714-B2** which is a possible reference not occurring in the list of imported tags
- A red drawing number **NL34-B2-31-014 SH.002** in the orange box at the bottom right, which does not have any imported document associated with it
- A couple of red line numbers that appear to be missing in the source systems

This is a very powerful type of visual completeness / consistency report. Information Managers can use this information to find mistakes and omissions, not only in static content, but also in (imported) transmittals for example.

Search within a document

Enter one or more search terms (or partial terms) in the search field to search all of the text content in a document. For example, enter "V711B" or "compressor" and press the Enter key. To the right of the search field, the number of occurrences of the search term (hits) in the current document will be shown, as well as two blue arrows to navigate through the search results. Alternatively, you can press Enter from the search box to successively move to the next search result.

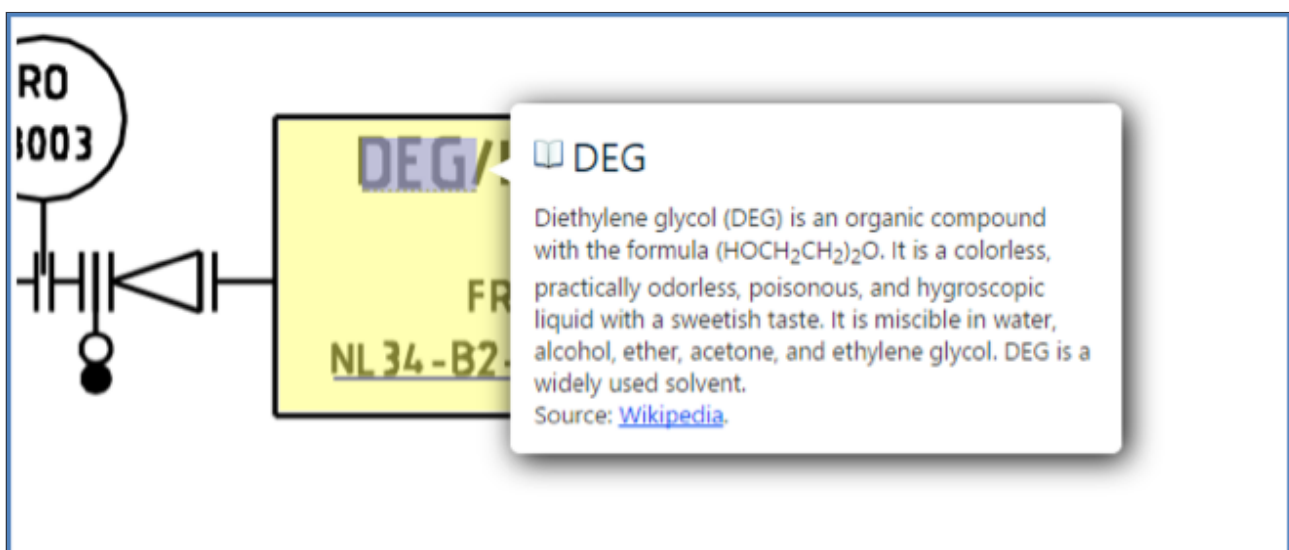
In the figure below you can see an example where "V-711B" has been found 35 times in the document, and the 5th occurrence is shown in an orange highlight in the first paragraph; other occurrence appears as blue highlights.



Hotspots

Another important feature of the document viewer is that any (possible) reference that appears within a drawing will automatically become a clickable hotspot. These references can be either text or symbols. Clicking on a hotspot displays the Preview popup of the reference, which might be tag information or an entire document. Learn more in [Navigating via References](#).

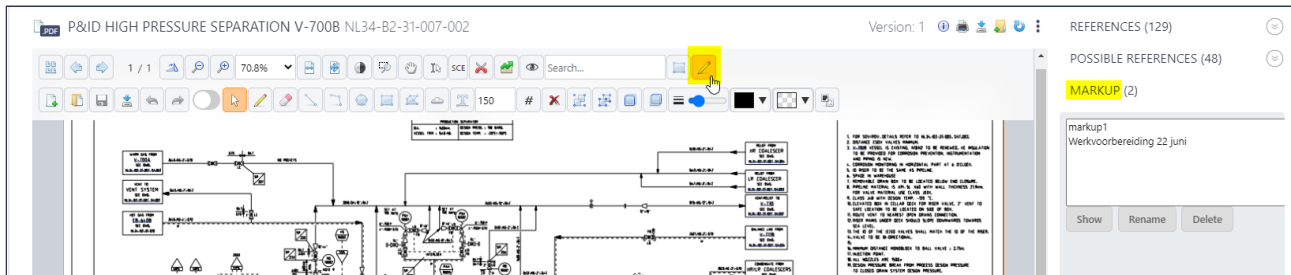
Viewport supports glossaries that contain the meaning of abbreviations or special terms. If a glossary term occurs in a document, you can click on that term to display the definition:



Working with Markup

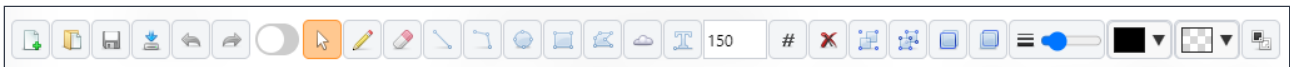
Viewport has the possibility to add markup to documents such as text, lines, circles, and other shapes.

You can create Markup (if enabled for your Viewport instance) via the pencil icon, highlighted in yellow below, or via the "Markup" panel next to the document:



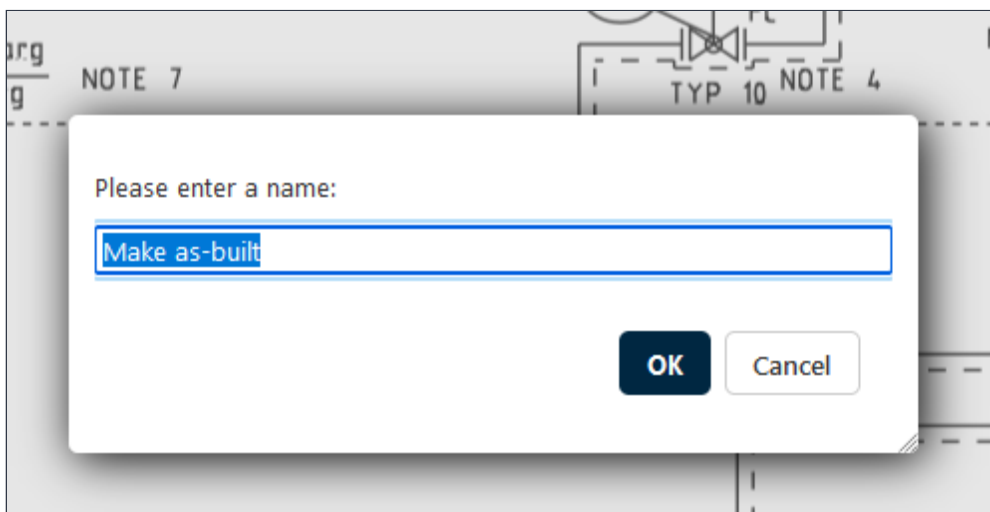
Markup is set to "private" visibility, which means it's only visible to the user that created it. If you want to share it with others, a marked-up copy of the document can be downloaded in PDF format. can be used to select previously saved markup and show / hide it (using the "Show" or "Hide" buttons respectively). You can also rename the selected markup, or delete it.

Clicking on the Pencil icon will open up a second toolbar in the document viewer:



The buttons are:

- **Create new markup** in the current document
- **Open existing markup**: this brings up a popup where you can select previously saved markup
- **Save**: save current markup, shows a popup where you can enter a descriptive name.



After clicking on "OK" the markup will be listed in the sidebar "Markup" panel.

- **Download:** download a copy of the current document including the visible markup
- **Undo**
- **Redo**
- **Tool Lock:** if the Tool Lock is active, you can repeatedly add lines, polylines, circles, rectangles, and so on; once you have drawn a shape, the tool remains active instead of reverting to "Select mode". Tool Lock makes it easy to quickly add a number of shapes, instead of having to select the same tool each time.
- **Select:** change mode to selecting markup items so you can move, rotate, copy, delete, and so on.
- **Eraser:** use the eraser mode to remove markup, by clicking + dragging the mouse.
- **Line:** draw a single straight line
- **Polyline:** draw multiple connected straight line segments
- **Circle:** draw a circle or ellipsis
- **Rectangle:** draw a square or rectangle
- **Polygon:** draw a closed polygon. You can close the polygon by clicking near the starting point or by double clicking.
- **Cloud:** draw a cloud shape, works the same as the Polygon tool.
- **Text, Font Size:** add text, with a certain font size
- **Auto-number Tool:** the auto-number tool can be used to draw circles containing automatically numbered sequences. By default it starts with "1" but you can also change it to start with "a" or "A".
- **Delete:** delete the selected markup
- **Group:** group the selected markup into a single item
- **Ungroup:** ungroup grouped markup into individual items
- **Bring to Front:** puts selected markup in front of all other markup
- **Send to back:** puts selected markup behind all other markup
- **Line width:** drag to change line width
- **Foreground color:** color picker to choose foreground color, typically used for fonts and lines.
- **Background color:** color picker to choose fill color (for circles and other closed shapes).
- **Default colors:** click to reset the colors to default (black / transparent)

You also can hover over the buttons to see a hint on the function of that button.

The References and Possible References panels

References

The References panel can be found on the right-hand side of the screen, and shows **References** for the currently viewed item. References make it easy to jump to related content!

Here is an example of References for a P&ID:

Version: 25 May 2021 16:52
References (97)

HSE (0)

◀ Operating Manual (1)

 Volume F LP Separation

Procedures (0)

◀ Drawings (5)

 P&ID HIGH PRESSURE SEPARATION V-700B

 P&ID LOW PRESSURE COALESCER V-711A

 P&ID WELL-3

There are two types of reference:

- **The "Is mentioned in" reference:** the currently viewed item *is mentioned in* another item. In the example screenshot above, the currently viewed drawing is mentioned in an Operating Manual chapter called "Volume F LP Separation".
- **The "Mentions" reference:** the currently viewed item *mentions* some other item. In the example screenshot above, the currently viewed drawing 5 other documents in folder "Drawings", including "P&ID Well-3". It also mentions 91 tag numbers (not visible in the screenshot), including "V-700B" that has a blue underline in the document viewer.

You can tell the two items apart by the orange icon behind the name: an "Is mentioned in" reference has an orange icon behind its name, a "Mentions" reference does not. The orange icon basically indicates: if you want to see the reference, you will be taken to another page.

Clicking on a reference has the following result:

- **"Is mentioned in" reference:** shows a [Preview Popup](#), which allows you to see whether something is worthwhile to visit before actually going there.
- **"Mentions" reference:** first the item inside the currently viewed file is highlighted, and then the [Preview Popup](#) is shown next to the highlighted item. It could be that the reference occurs inside a file more than once; clicking repeatedly on the reference will loop through all the occurrences.

Clicking on a reference also shows a "Go to" link behind the reference, that will take you to the referenced item directly.



TIP

By Ctrl+Clicking on a reference name, the Preview popup is skipped and you are taken to the reference immediately.



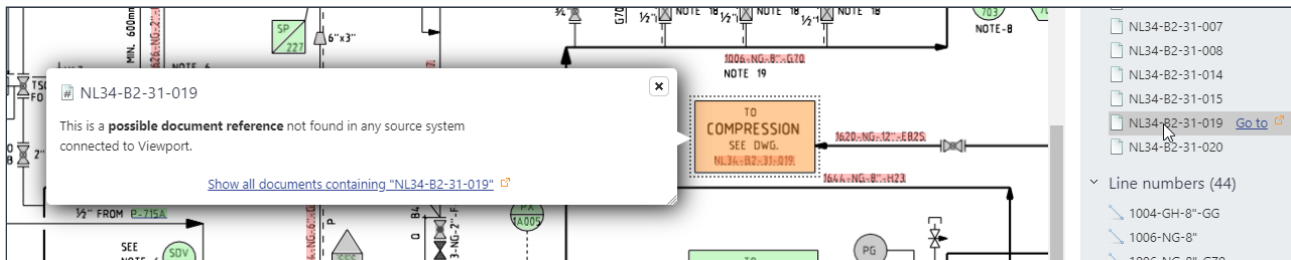
TIP

You can also right-click on the "Go to" link and use your browser's "Open in new tab" menu item to open the reference in a new browser tab. This is handy when gathering information for multiple (referenced) items.

Possible References

The Reference Pane also contains the **Possible References** panel.

Possible references (or 'candidates') are denoted with a dashed light grey underline, whereas a reference is identifiable by a solid blue underline in the document viewer.



The Preview Popup

The Preview Popup shows you information about the reference at a glance:



As this screenshot shows, the preview popup has the following elements:

- For files only (not shown in this screenshot): A **thumbnail** image of the first page
- **Properties** of the reference (e.g. tag information, or document metadata)
- **References** of the referenced item; clicking on these references will bring up another (nested) preview popup! This 'references of a reference' allows you to download referenced documentation for a tag that is shown on a drawing.
- **Custom data** that is dynamically added by plugins, such as real-time data (the **"Trend" tab** in the screenshot above), active work orders (the **"Workorders (2)" tab** in the screenshot above), isolations (the **"Isolations (1)" tab**), etc.

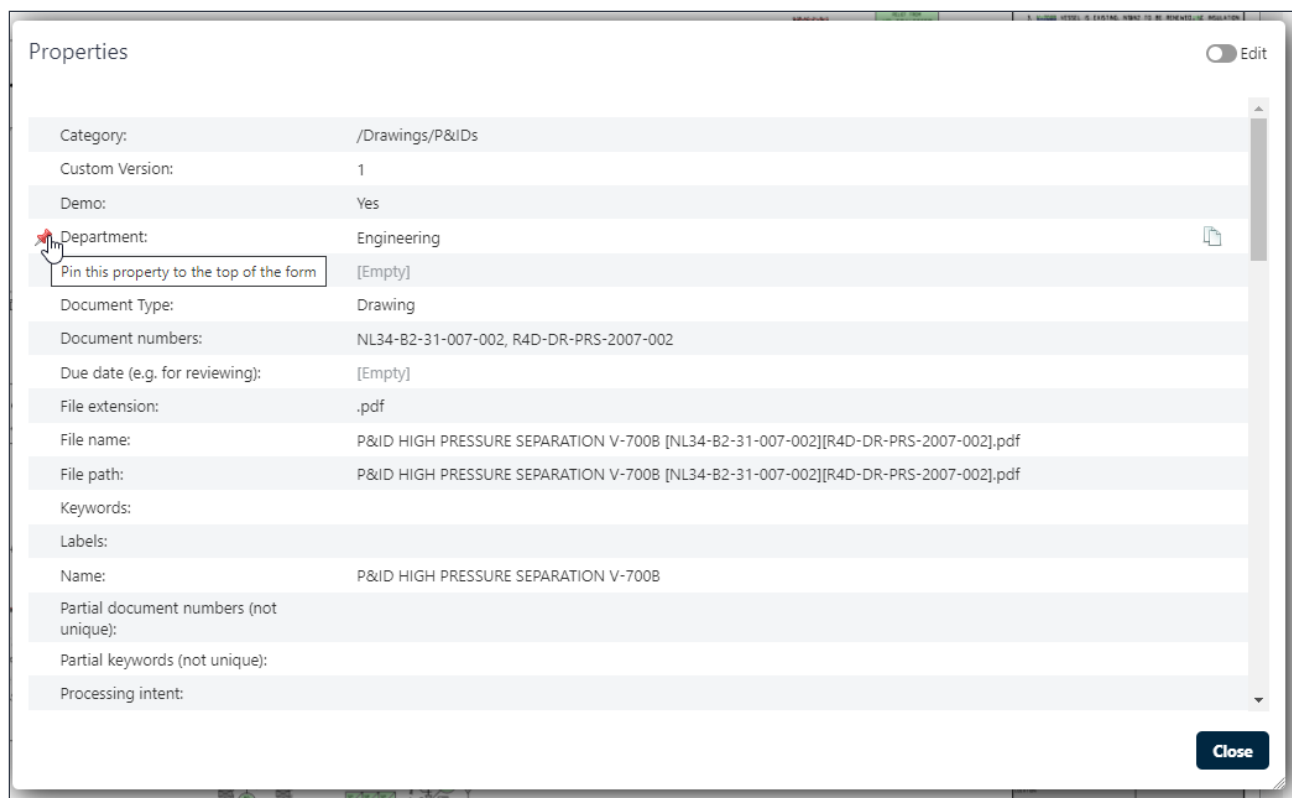
- **"Go to..." link:** You can click on the "Go to..." link that appears behind the clicked reference or in the pop-up window (see the figure above). If you keep the Ctrl key pressed while clicking on this link, the reference page is opened in a new browser tab.

The Preview Popup also shows additional **actions** that can be performed on the item. More details can be found in the section [Context-specific actions](#).

Properties Popup

The Properties Popup is shown when you click on:

- The '(i)' icon in the [Viewer Header](#)
- The '(i)' icon in the [Preview Popup](#)
- The "Show all properties" link in the [Viewer Footer](#) (or an empty area in the Viewer Footer will also do).
- The "Show all properties" link in the Properties panel shown next to the currently viewed item (if the Properties panel is available).



The screenshot shows a 'Properties' popup window with a title bar and an 'Edit' toggle. The main area contains a list of properties in a table-like format. A red arrow points to a pin icon next to the 'Department' field, with a tooltip that says 'Pin this property to the top of the form'. The 'Close' button is in the bottom right corner.

| Property | Value |
|--|--|
| Category: | /Drawings/P&IDs |
| Custom Version: | 1 |
| Demo: | Yes |
| Department: | Engineering |
| Pin this property to the top of the form | [Empty] |
| Document Type: | Drawing |
| Document numbers: | NL34-B2-31-007-002, R4D-DR-PRS-2007-002 |
| Due date (e.g. for reviewing): | [Empty] |
| File extension: | .pdf |
| File name: | P&ID HIGH PRESSURE SEPARATION V-700B [NL34-B2-31-007-002][R4D-DR-PRS-2007-002].pdf |
| File path: | P&ID HIGH PRESSURE SEPARATION V-700B [NL34-B2-31-007-002][R4D-DR-PRS-2007-002].pdf |
| Keywords: | |
| Labels: | |
| Name: | P&ID HIGH PRESSURE SEPARATION V-700B |
| Partial document numbers (not unique): | |
| Partial keywords (not unique): | |
| Processing intent: | |

The Properties Popup shows the full list of metadata available for the item in three sections:

- **Custom properties:** The first section of properties contains properties that are not considered "system" properties. These are either imported from a source system, set by Viewport processes (like the built-in rule engine called the "Labeler"), or added manually.
- **System properties:** These properties are read-only properties created and set by Viewport during processing and contains for instance (database) identifiers, timestamps, and so on.

- **Processing Status:** This section contains status information concerning the internal processing steps performed by Viewport, such as OCR, shape recognition or text extraction.

The properties are sorted alphabetically by default, with boolean (checkbox-type) properties listed last.

You can change the order of the properties to your own liking by **pinning a property** to the top of the list. If you hover over a property, an icon of a pin appears that you can click to pin the property to the top of the list. The screenshot above shows this for the "Department" property.

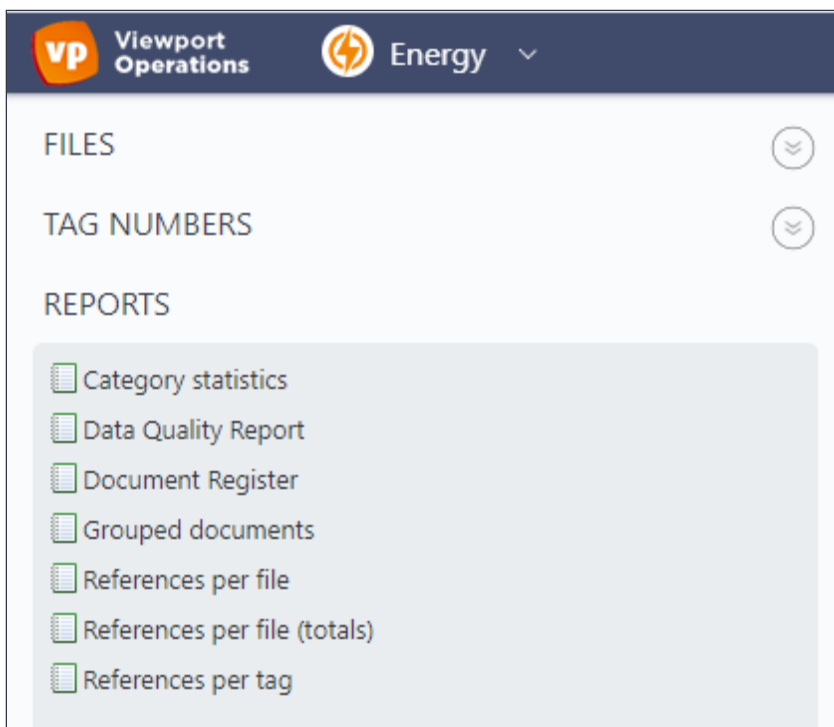
You can 'unpin' the property by clicking on the pin icon again, moving the property back to its original place in the alphabetical ordering. Pinning is remembered inside your browser, so it is not Viewport-wide.

! INFO

The results of pinning a property is that it is also available in the "Properties" panel. As pinning is remembered in your browser only, which properties are visible in the "Properties" panel is specific for your account only.

Reports

In the Tree Pane you can find a section called Reports:



The reports listed are a combination of vendor reports (that are bundled with Viewport) and custom reports (added by a system administrator) so your list may be different.

- **Category statistics:** This report gives an overview of the statistics per file category: the number of files within that category, the number of possible references, etc.
- **Data Quality Report:** This report gives a dashboard with information on the (possible) references between tags and documents. It is a quality indicator for possibly missing information on (a specific set of files) in a document

management system, or missing tag numbers in a maintenance management system. The report can be run for the complete site or for a specific folder. The tag numbers that are used in the analysis can also be restricted using a special VQL query; more information about VQL can be found in the Administrator guide.

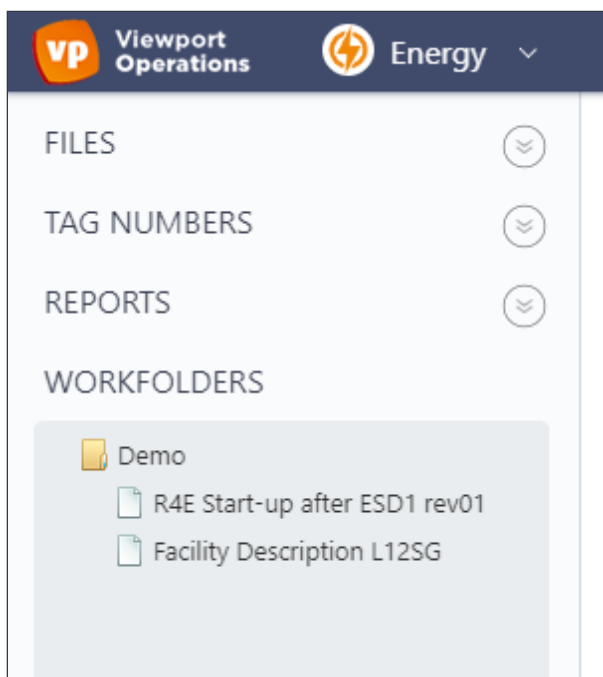
- **Document Register:** This report produces an overview of all files with their metadata (properties) within the site.
- **Grouped documents:** This report lists all files that Viewport has grouped into a single entry. This happens for example when two files are found in a DMS or on a network share and both share the same document number. The report can be used by a Content Administrator to choose between several copies and choose a single master file.
- **References per file:** This report gives an overview of all references per file, for all files in the current site.
- **References per file (totals):** This report gives an overview of the totals of references per file, for all files in the current site.
- **References per tag:** This report gives an overview of all references per tag, for all tags in the current site.

For some reports, a Viewport-wide report is available in the Administrator Tools section. If you require reporting across sites, consult your Viewport Administrator.

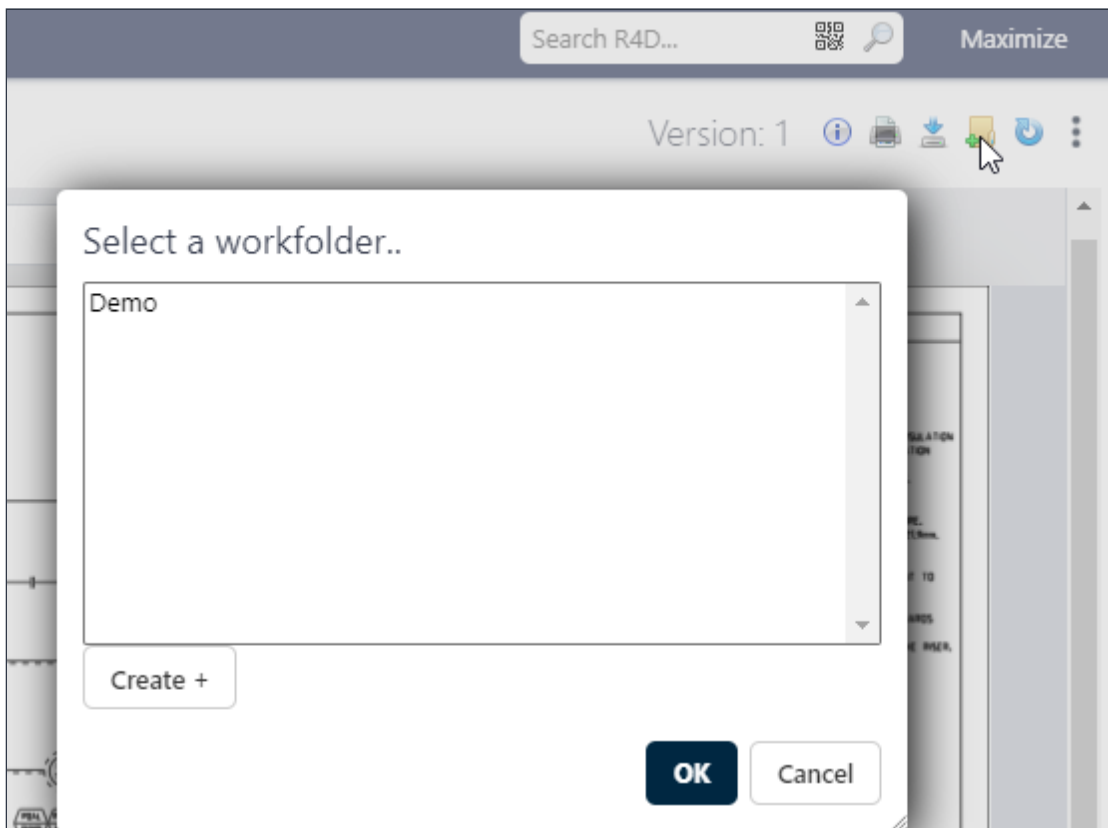
Workfolders

If you have the Workfolder module, in the Tree Pane you can find a section called Workfolders.

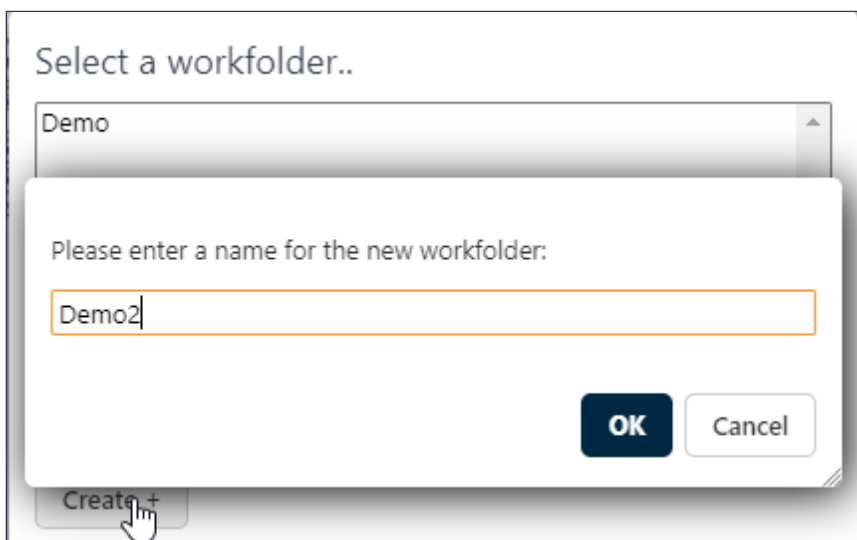
Workfolders offer a way to organize your document-based workflow. You can create a workfolder and add documents and tags to it. You can use workfolders for Management of Change (MoC), work preparation or for favorite content.

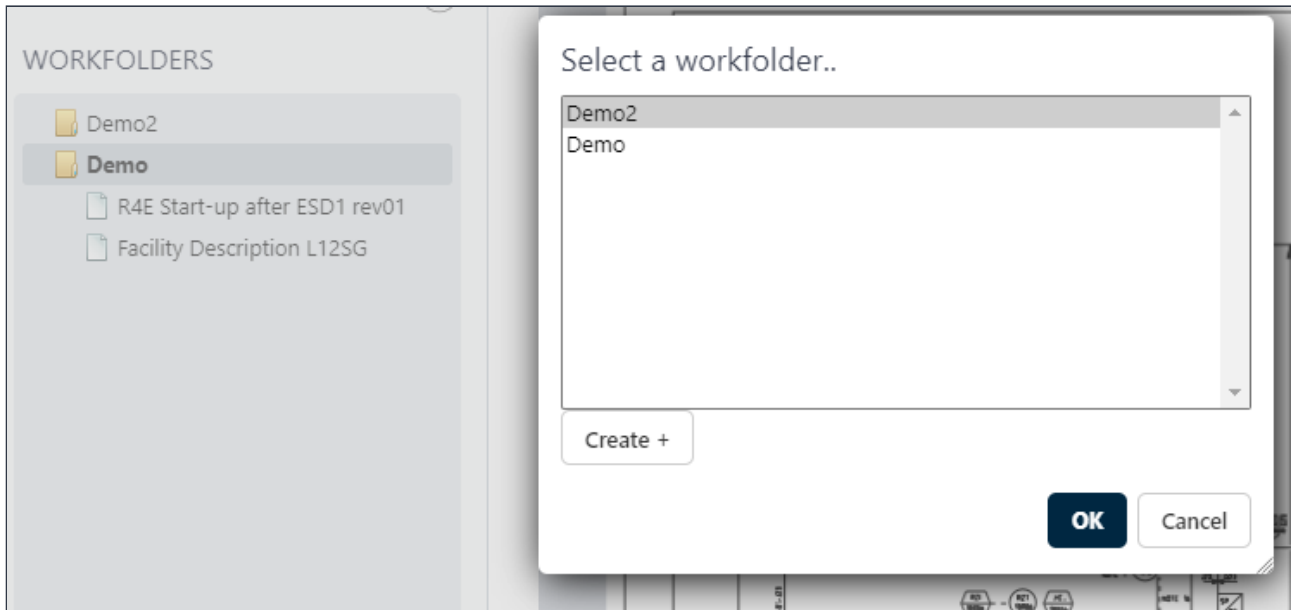


To add a document or tag to a workfolder, you can click on the "Add to workfolder" icon that is shown in the [context-specific actions](#) as a yellow folder icon with a green "plus". When you click the button, a pop-up appears where you can either select an existing workfolder or create a new one.



If you click "Create" a popup appears where you can fill in a name:





When you click "OK", the item is added to the workfolder and will be shown in the Tree Pane.

NOTE

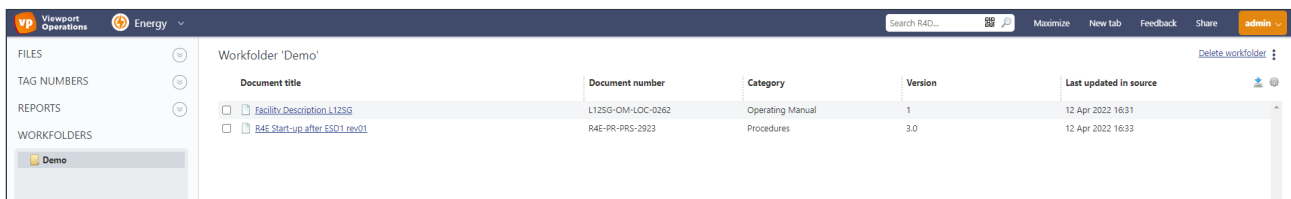
The added item may not show up in the Tree Pane immediately. If that is the case, refresh the page using the browser's Reload button or by pressing F5.

Deleting a workfolder

You can remove or share a workfolder by selecting it in the Tree Pane. This will open the workfolder in the Content Pane. You can then choose "Delete workfolder" (visible at the top right of the viewer).

Sharing a workfolder

You can share the workfolder with others, using the "Share" link in the menubar (at the top right):



If you share a workfolder, the link that is sent to the recipient will allow users with a "Guest" role to view just the files in the shared workfolder. This makes it easy to share a (very) limited set of information with e.g. contractors in a cost-effective way, since it does not require a regular user license.

Tag Viewer

The Tag Viewer shows properties of a tag (equipment), such as the model number and manufacturer. This page also mentions the source of data (such as SAP or Maximo).

The figure below is an example of a tag information page for V-700-B showing properties from Ultimo.

The screenshot displays the Viewport Operations interface for tag V-700-B, a Production Separator Vessel HP. The left sidebar lists tag numbers from A-E to V, with V-700-B selected. The main area shows a table of properties with columns for Name, Value, and Source. The right panel lists references such as 3D Models, Drawings, and Manuals.

| Name | Value | Source |
|----------------------------|--------------------------------|--------|
| ABC Indicator | C | Ultimo |
| Certificate Date | 07/04/2017 | Ultimo |
| Description | Production Separator Vessel HP | Ultimo |
| | Production Separator | Manual |
| Design Pressure | 100 Barg | Manual |
| Design Temperature | -20°C/+100°C | Manual |
| Diameter | 1600 mm | Manual |
| ExternalId | 123989 | Ultimo |
| Func.Loc | R4/R4D/EXT/MSEP/V-700B | Ultimo |
| Gross Weight | 0 | Ultimo |
| Inventory Number | 31001046475 | Ultimo |
| ISO group | 19 | Ultimo |
| Manufacturer | MC-EVOY | Ultimo |
| Manufacturer Part Number | REG NR 478690 | Ultimo |
| Manufacturer Serial Number | 192298 | Ultimo |
| Model | DN 12x10/9100927 | Ultimo |
| Name | V-700-B | Ultimo |
| | V-700B | Manual |
| Supplier | DELAVAL | Ultimo |
| Tag | V-700-B | Ultimo |
| | V-700B | Manual |
| Type | SEPR | Ultimo |
| Vessel Trim | 1648-NG | Manual |

Although this screen shows a single tag number, the page actually can show multiple tag numbers at the same time, for example from source system A (e.g. a CMMS) and source system B (e.g. an Excel file). The column "Source" will indicate which source system a property comes from.

In case the same property occurs in multiple sources, Viewport can be configured to handle this in one of the following ways:

- **Display all values:** shows all values from the different source systems, each on an individual row.
- **Display first:** shows the value from the 'first' source system, regardless if that is empty or not. See the remark below regarding source system ordering.
- **Display first non-empty:** Loops over the ordered source systems, returning the first non-empty value.

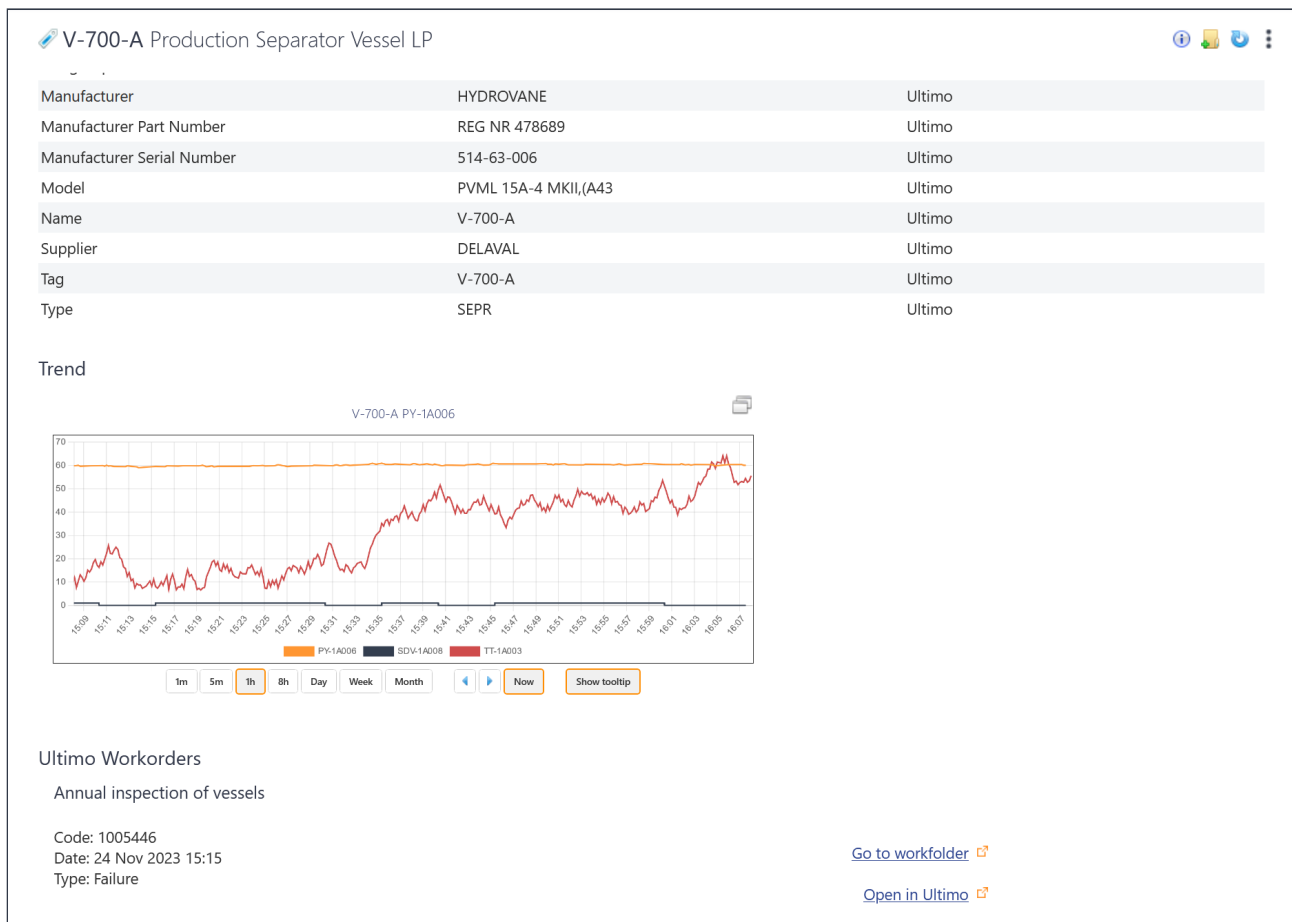
In case of multiple values per source system, the source systems are ordered by source "niceness" (lowest first), then by alphabetically by source name. The source "niceness" is a number that system administrators can set.

NOTE

For example, a maintenance system can be set to "niceness" 1 and a file share to "niceness" 2. In case of multiple values, the property from the maintenance system will be considered first, then the property from an Excel file in the file share.

Customization

The Tag Viewer can be customized by a Viewport administrator, either using Viewport configuration options or using plugins. For example:



Configuration options for the Tag Viewer include:

- Hiding specific properties (`propertyBlacklist`)
- Moving properties to the top of the list (`propertyWhitelist`)
- Warn if multiple values for a property exist (`warnIfConflictingValues`)
- Group the properties by source system in collapsible sections
- Automatically format property names (so that e.g. "SOME PROP" becomes "Some prop")

As shown in the screenshot, plugins can add custom content as well, such as retrieving (and showing) work orders from a maintenance system (in this case Ultimo) or by showing real-time values (in this case from Aveva PI).