

DeltaV™ Logbooks

- Minimize shift handover risk
- Electronically document events, observations, and notes
- Improve task management to drive operator action
- Programmatically create log entries based on process events
- Find information with searchable electronic knowledge base
- Embedded in DeltaV™ platform

Introduction

DeltaV Logbooks is a browser-based application used to capture electronic records of operator activity as well as plan and track operator tasks during a shift. With Logbooks, operators can record information about daily operations, view a prioritized task list, and access a shift change dashboard that includes shift status and summary reports. By storing information electronically, operators can easily access a historical knowledge base in order to make more informed decisions to keep the plant running safely and efficiently.

Electronic logbooks help identify:

- Tasks that need to be completed and the responsible person/team.
- When required tasks are incomplete and need follow-up.
- Past observations on equipment or process issues and how they were resolved.
- Key information to help a new shift continue to operate the plant safely and effectively.



DeltaV Logbooks helps operations teams collaborate during a shift and facilitate more effective shift handovers.

Benefits

DeltaV Logbooks is a licensed feature for the DeltaV system, providing the following benefits:

Minimize shift handover risk. Shift handover can be a risky part of the day. Communication between the current shift and the new shift is critical to success. Too often, this communication path breaks down and the new shift is left with incomplete information and lack of visibility to priority issues.

Logbooks provides a dashboard that delivers a high level summary of what has happened during a shift as well as on-going tasks. Operators can access more detailed information through classification, status, or user configurable filters. If needed, they can easily view past shift summaries as well.

Logbooks can also drive a more consistent shift handover process. Critical knowledge, including open tasks, notes, and other non-routine events, is collected and approved as the facility transfers into the next shift.

Users can also create shift reports for management or compliance requirements. Reports can be viewed online, printed, or saved in a variety of formats including pdf, doc, xls, or xml file.

Improve task management. With whiteboards and verbal instructions, it is easy to overlook tasks. Lower priority tasks can be forgotten and recurring actions can be overlooked. By automating task management, you can ensure necessary work is not missed. Set an expected start and completion time to both remind operators that a task is due and help them plan and prioritize work.

Gain visibility to the status of tasks and receive alerts for escalation flags if something is not completed by the assigned time. The incomplete task will be also be visible on the shift dashboard.

Assign parameters to tasks to improve communication and planning. Attributes include whether a task is on-demand, scheduled for later, or recurring, start and due dates, shift assignment, priority, description, user group, classification, and reason.

Improve visibility and accuracy of log entries. Manual entries in paper logbooks are difficult to use as references to drive future action. If operators can find the entry they are looking for in an existing log book, information may be either illegible or incomplete.

By transitioning to electronic logbooks, operators can quickly create log entries through simple text entry or by using forms/templates for more comprehensive records. A log entry can include a screen capture of a process control system graphic and associated operating information via an OPC read to provide additional context to the incident. Add notes and other observations as well. You can even include links or references to external documents or add attachments. A log entry could include a running dialog between one or more users.

Not only is the information more complete and easy to read, operators can view past log entries by selecting the day on a calendar. Search existing entries by text string, area or equipment, or template type. An advanced search option enables user-built search criteria. By indexing all log entries to make them searchable, electronic logbooks delivers a robust knowledge base to your operators to help accelerate problem-solving and decision-making.

To support audits and corrective action processes, Logbooks automatically records the name of the user who entered or last edited a log entry and the time of the change.

Product Description

DeltaV Logbooks is a licensed feature that provides an embedded DeltaV application for the collaboration and task management through a browser-based interface available directly on a DeltaV Operator station.

Single Sign-On. When the Logbooks interface is accessed, the DeltaV user is automatically passed to enable access in correct context for the operations team. There is no need to login to Logbooks separately from the DeltaV system. The login process can be required for Logbooks if desired or if accessing from a browser that is not on a DeltaV workstation.

Access from DeltaV Operate. With the new toolbar button added in v13, accessing the Logbook is as close as the toolbar. For v11/v12, there are detailed instructions on how to add buttons to toolbars as desired.

No Additional Infrastructure Required. Logbooks can be installed on an existing Application Station and leverage past investments in DeltaV networking and servers. As the system grows, it may be beneficial to dedicate a server to the task.

Common Equipment Model. Leverages the equipment hierarchy for linking logbooks to areas and/or equipment through an easy to use import process.

Event Monitor. An optional licensed component of DeltaV Logbooks enables automatic creation of log entries based on OPC values or DeltaV Events. These auto-generated entries can trigger tasks in the system that need to be completed and flag them to raise attention to issues that may need to be remediated.

Intuitive Interface. The user-friendly, intuitive interface means operators can use the application immediately. Task-based actions make “to-do list” set-up, comment capture, search, and report generation easy.

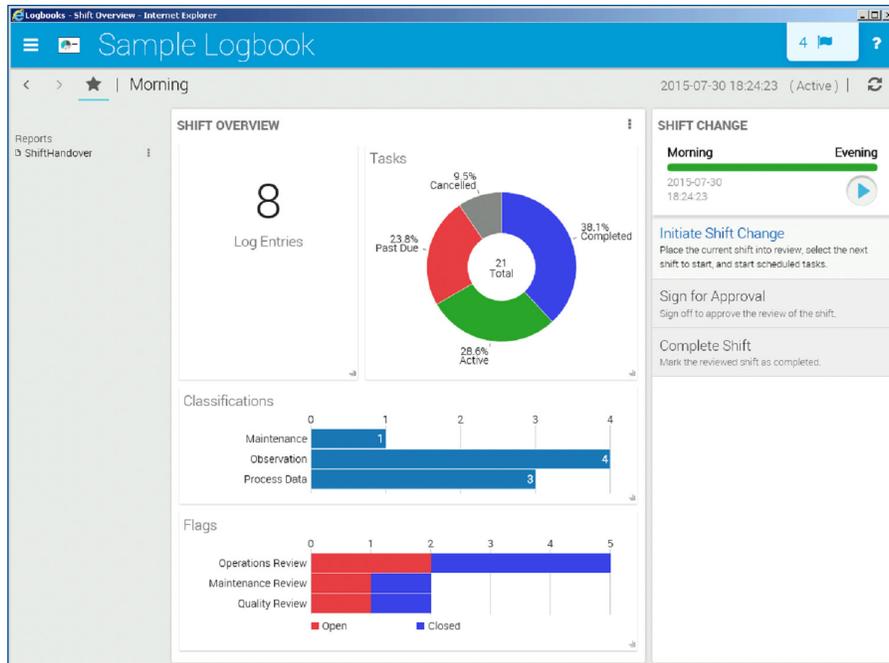
User Dashboard. Logbooks displays a dashboard customized to the logged in DeltaV user. Relevant logbooks and assigned tasks are listed based on the responsibilities defined for the user.

Contextual Information. Comments and activity can be grouped by shift, equipment, or other user-definable structures so information is quickly available in context.

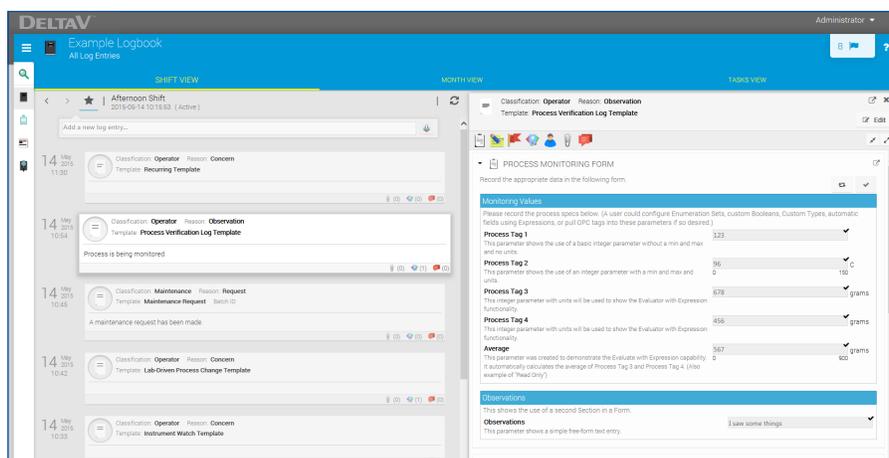
Common User Authentication. Leverage existing DeltaV Active Directory structure to authenticate Logbooks users. Just import users, and declare their Logbooks permissions, leveraging roles as groups to make administration easier.

Comprehensive Entries. Take snapshots of current unit or equipment status and add comments and insights so log entries provide complete information for future reference.

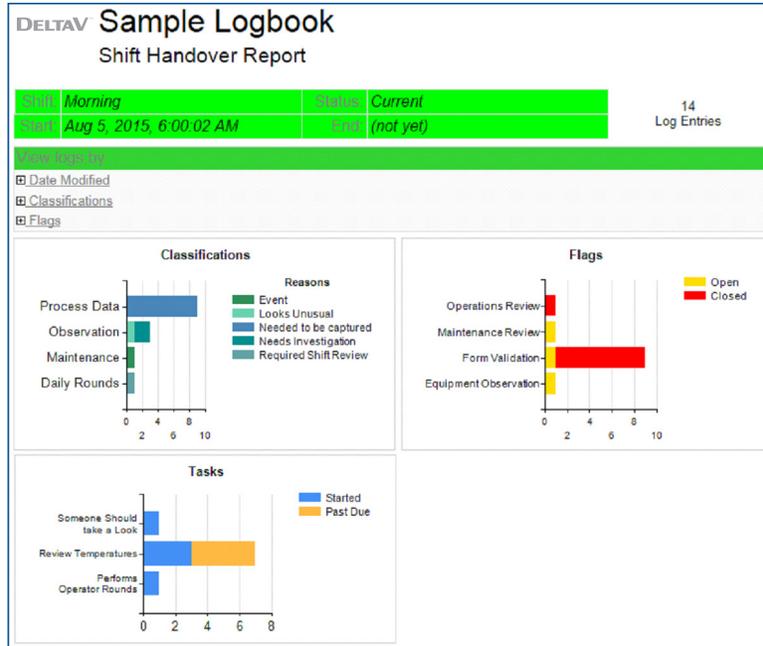
Audit Trail. All transactional actions (insertions, updates, deletions) in Logbooks are recorded in the Audit Trail and stored permanently. Audit Trail documents who, what, where, and when.



Shift transitions represent a critical moment, especially if there are issues ongoing. The DeltaV Logbooks Shift View allows the incoming operations team see the issues that are flagged for review, and any pending tasks to better manage the shift handover. During the shift, the team has a comprehensive view into activities and associated tasks.



Electronic templates make repetitive log entries and tasks easy. Online forms replace paper records that have to be printed, manually filed, and stored.



Provides shift reporting in a configurable reporting environment.



DeltaV v13 provides direct access to Logbooks through a new toolbar icon in DeltaV Operate.

Guardian Support. Support for DeltaV Logbooks is per existing Guardian support - just like any other additional function with DeltaV.

Backup and Recovery Support. Support for backing up DeltaV Logbooks content is supported from the B&R v2.3.1 release forward with an included template to keep logged information safe.

Ordering Information

Description	Model Number
Logbooks for DeltaV – 5 named users	VFDVLS0005
Logbooks for DeltaV – 25 named users	VFDVLS0025
Logbooks for DeltaV – 150 named users	VFDVLS0150
Logbooks for DeltaV Event Monitor	VFDVLEM
Additional User Scale-Ups	VFUPSDVLUSxxxx
CPU -2-core Scale-Up for Logbooks Database	VFDVLSM2012

Where xxxx represents the number of additional named users required. User additions can be ordered in quantities of 5, 25, 50, 100, 150, 200, 250, 300, 400, 500, 700, 1000, and 2000.

Application Notes

- DeltaV Logbooks installs on a DeltaV Application Station with DeltaV v11.3 1 or higher.
- DeltaV Logbooks is installed with a self-signed SHA-2 digital certificate which will expire in 90 days. SHA-2 digital certificates provide enhanced security and allow the certificates to be compatible with the latest browser versions. Before the self-signed certificate expires, you are required to obtain a compatible certificate issued by: a private Certification Authority (CA); or a Root CA (self-signed) that is managed by your organization. Commercial CAs can only be used if the web-based DeltaV application server has a Fully Qualified Domain Name and therefore is connected to the open/public network (internet).
- Single Sign-On requires the installation of a client component and application of a DeltaV Hotfix to enable secure, embedded functionality in v11, v12, and v13 on each workstation.
- Logbook clients require an Internet Explorer 11 (IE11) or Chrome browser for best results. Refer to KBA NK-1600-0012 for information on upgrading DeltaV v11 and v12 Windows 7 computers to IE11.
- Installation of the Logbooks server on a DeltaV v11 and v12 Server 2008 computer is supported. However, since IE11 is not approved for use with Server 2008, it will be necessary to access the Logbooks server using a supported browser on another computer.
- DeltaV Logbooks can be installed:
 - On an Application Stations (some exclusions for other web server-based products – see installation documentation)
 - On a non-DeltaV machine on the DeltaV Area Control Network (can be Windows Server 2008, 2012 or 2016)
 - On a non-DeltaV machine on a manufacturing LAN above the Area Control Network (can be Windows Server 2008, 2012 or 2016).
- For critical deployments, DeltaV Logbooks supports Microsoft Network Load Balancing ('NLB') as well as a clustered SQL deployment as required.
- DeltaV Logbooks is licensed to an Operating System Environment ('OSE') that leverages up to six processor cores. If an OSE (physical or virtual) with more cores is used to deploy the database for Logbooks, the CPU Core scale-ups are required. For example, a 6-core/dual CPU machine would have 12 cores and require 3 CPU Core scale-ups.
- Creating log entries with the Event Monitor creates a log entry that may be template-based (depending on Event Monitor setup) that also capture the trigger information. Sophisticated template-based entries that parse the trigger information (OPC or SQL) into a log entry require addition engineering services. These services are available through the Advanced Services channel used for DeltaV and can be significant relative to the cost of the Event Monitor.

More Information

To see a brief demonstration of the product, visit the Emerson Logbooks webpage: www.emerson.com/logbooks

Related Products

- **DeltaV Operate.** Gives users direct access to all operating information — including current process values, current operating displays, and alarms with proper priority and timestamp.
- **DeltaV Event Chronicle.** Captures process, system, and user alarms and events and stores them in a Microsoft SQL Server database.

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