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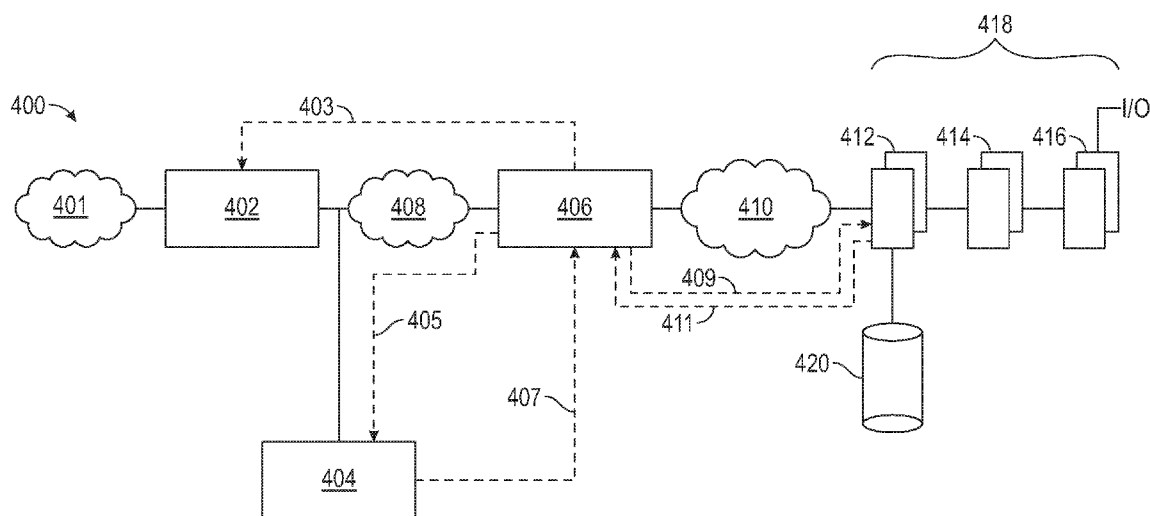


FIG. 4

(57) Abstract: A system and method for synchronizing instrument specification data between a process control system and an external database are provided. A software application automatically connects to the process control system and scans a set of data utilized by the system to detect changes in the data since a previous scan. If changes are detected, the application notifies a manager to accept or reject changes. If changes are accepted, the application updates data stored on an instrumentation database external to the process control system so that the data stored on the instrumentation database is synchronized with real-time data used by the process control system. The system and method provide automated updates to ensure the accuracy of data utilized by users not having regular access to the process control system.

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*SYSTEM AND METHOD FOR SYNCHRONIZING INSTRUMENTATION  
SPECIFICATIONS BETWEEN A PROCESS CONTROL SYSTEM AND A DATABASE*

by

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CROSS REFERENCES

[0001] This application claims the benefit of U.S. Application No. 15/947,692, filed on April 6, 2018, which application is incorporated herein by reference.

FIELD OF THE INVENTION

[0002] The present invention relates generally to a system and a method for automated synchronization of instrumentation specifications in a process control system with a database external to the control system.

BACKGROUND

[0003] Industrial facilities, which may include manufacturing facilities, refineries, chemical plants, or other similar types of facilities, utilize automated process control systems comprising numerous pieces of process instrumentation and control equipment, which facilitate automated control of various process equipment in the facility such as valves or pumps in order to produce a desired process performance. Examples of process instrumentation may include flow meters, temperature sensors,

pressure transmitters, level sensors, and analysis instruments such as pH meters.

Instrumentation generally operates at a defined setpoint within a specification range, though depending on the application, setpoints may be changed either outside of a given range or within the range based on optimization of operating conditions. Due to continued maintenance and optimization in a facility, operators controlling the process control system may change data values for setpoints in the process control system frequently.

[0004] Because the automated process control system is the facility operators' primary tool for control of the process, the control system itself always maintains the most current instrument specification data, which may include instrument setpoints, ranges, alarm settings, instrument name, description, dimensions, or other types of data relating to a process control instrument. Each instrument in a facility has an instrument specification sheet containing various data relating to the instrument. This data is typically maintained in an offline instrumentation specification database external to the process control system. When specification data is changed during the operation of a facility, which may occur on a large scale when a project is commissioned to upgrade the facility, which may include upgrades to the process control system, the instrumentation specification database is not typically updated in a timely manner to reflect the numerous changes in instrumentation data that occur. Often, the database is incompletely updated or not updated at all during major facility upgrades, or may be updated at a later time as a stand-alone project. Because even relatively small industrial facilities typically have a very large number of process control instruments, maintaining the offline instrumentation database may be a time-

intensive and thus costly process. Because engineers and others in a facility generally rely on data contained in the instrumentation database, discrepancies in instrument specification data between the instrumentation database and the process control system can be problematic and require continuous double checking to ensure accurate specifications are being relied upon. These problems lead to inefficiencies in managing and operating a complex facility.

[0005] Accordingly, there is a need for an automated system and method for continuously maintaining accurate instrument specification data relating to instruments in a process control system in a database external to the control system.

#### SUMMARY

[0006] The present invention provides a system for automated synchronization of instrumentation specifications in a process control system with a database external to the control system and a method for automatically synchronizing instrument specification data between a process control system and an external database in accordance with the independent claims. Preferred embodiments of the invention are reflected in the dependent claims. The claimed invention can be better understood in view of the embodiments described and illustrated in the present disclosure, *viz.* in the present specification and drawings. In general, the present disclosure reflects preferred embodiments of the invention. The attentive reader will note, however, that some aspects of the disclosed embodiments extend beyond the scope of the claims. To the respect that the disclosed embodiments indeed extend beyond the scope of the claims, the disclosed embodiments are to be considered supplementary background

information and do not constitute definitions of the invention *per se*.

[0007] A system and a method for synchronizing or updating instrument specification data relating to process control instruments for controlling a process is provided. The system includes an automated process control system configured to automatically control a process based on instrument specification data input by an operator of the process control system and an update server operatively connected to an instrumentation database that is external to the process control system. An automated update software application is stored on the update server and is programmed to automatically update the instrumentation database so that instrumentation data stored in the instrumentation database matches current instrumentation data used by the process control system to control the process.

[0008] The process control system includes a process control database that stores all real-time instrumentation data used to control the process. The instrumentation data stored in the process control database is continually changed by operators of the process control system, as needed, over the life of the facility in order to reflect desired operating conditions at any given time. Instrumentation data may be changed by operators for a variety of reasons such as a response to a process upset, process optimization efforts, or changes or upgrades to the process control system, among other reasons. The software application is programmed to connect to the process control system intermittently and scan the real-time instrument specification data stored in the process control database at predefined time intervals. When scanning the data, the application detects all changes in the instrument specification data that have been implemented since the most recent scan. If any change is detected, the

application sends an approval request to a manager having authority to grant the approval request. If the request is granted, the update server stores updated instrument specification data within the instrumentation database. This updated data overwrites existing data so that the data stored on the instrumentation database accurately represents the real-time data utilized by the process control system, though previously stored instrumentation data may be retained to create a record of changes. Thus, facility managers will be notified in a timely manner of all changes to the process control system, and if approved by a manager, all changes will be updated in the offline instrument specification database.

[0009] Accordingly, the present system for updating an instrument specification database provides an automated synchronization tool, though approval for all changes is required for management purposes and industry protocols requiring facilities to document all changes in industrial processes for regulatory and safety purposes. The present system is advantageous in that it eliminates the manpower required to manually update an offline instrument specification database, which is the main repository for specification and design documents when upgrading, expanding, building, or modifying an industrial facility such as a chemical plant, refinery, or manufacturing facility. Change approval requests may be sent to a designated supervisor depending on the unit location of the instrument within the facility. Managers or supervisors may be notified by email or by any other suitable method of notification.

[00010] The present automated database synchronization system is a universal system that can communicate with any commercially available process control system that

utilizes instrument specification data. The present system may be utilized in any type of chemical plant, refinery, paper mill, manufacturing facility, or any other similar type of industrial facility with a process control system using an OPC (open platform communication) gateway for communication. OPC is an industry standard communications protocol available on virtually all automated process control systems that are currently commercially used in industrial facilities.

[00011] Additional features and advantages of the invention will be set forth in the description which follows, and will be apparent from the description, or may be learned by practice of the invention. The foregoing general description and the following detailed description are exemplary and explanatory and are intended to provide further explanation of the invention.

## DESCRIPTION OF THE DRAWINGS

These and other features, aspects, and advantages of the present invention will become better understood with regard to the following description, appended claims, and accompanying drawings where:

FIG. 1 illustrates a diagram of an example environment in which techniques described herein may be implemented.

FIG. 2 illustrates an exemplary diagram of a client of FIG. 1 according to an implementation consistent with the principles of the invention.

FIG. 3 illustrates a diagram of an example of a computing device and a mobile computing device.

FIG. 4 is a diagram illustrating an example system configuration in accordance with



the present disclosure.

FIG. 5 illustrates a process flow chart of a method that may be used in accordance with the present disclosure.

## DETAILED DESCRIPTION

[00012] In the Summary above and in this Detailed Description, and the claims below, and in the accompanying drawings, reference is made to particular features, including method steps, of the invention as claimed. In the present disclosure, many features are described as being optional, e.g. through the use of the verb “may”. For the sake of brevity and legibility, the present disclosure does not explicitly recite each and every permutation that may be obtained by choosing from the set of optional features. However, the present disclosure is to be interpreted as explicitly disclosing all such permutations. For example, a system described as having three optional features may be embodied in seven different ways, namely with just one of the three possible features, with any two of the three possible features, or with all three of the three possible features. It is to be understood that the disclosure in this specification includes all possible combinations of such particular features. For example, where a particular feature is disclosed in the context of a particular aspect or embodiment, or a particular claim, that feature can also be used, to the extent possible, in combination with/or in the context of other particular aspects or embodiments, and generally in the invention as claimed.

[00013] The term “comprises” and grammatical equivalents thereof are used herein to mean that other components, steps, etc. are optionally present. For example, a system

“comprising” components A, B, and C can contain only components A, B, and C, or can contain not only components A, B, and C, but also one or more other components.

[00014] Where reference is made herein to a method comprising two or more defined steps, the defined steps can be carried out in any order or simultaneously (except where the context excludes that possibility), and the method can include one or more other steps which are carried out before any of the defined steps, between two of the defined steps, or after all the defined steps (except where the context excludes that possibility).

[00015] Systems and methods consistent with the principles of the present disclosure may provide solutions for automated synchronization of process control instrumentation data between a process control system and an external, or offline, database. For example, the systems and methods may be used to automatically update an instrumentation database so that instrument specification data stored in the instrumentation database matches real-time instrument specification data stored in a process control database used for automated process control in an industrial facility such as a chemical plant or refinery.

[00016] Fig. 1 is a diagram of an example environment **100** in which techniques described herein may be implemented. Environment **100** may include multiple clients **105** connected to one or more servers **110-140** via a network **150**. Server **110** may be a search server, that may implement a search engine; server **120** may be a document indexing server, e.g., a web crawler; and servers **130** and **140** may be a hosting server and a general web server, respectively, such as servers that provide content to clients

**105**. Clients **105** and servers **110-140** may be connected to network **150** via wired, wireless, or a combination of wired and wireless connections.

[00017] Three clients **105** and four servers **110-140** are illustrated as connected to network **150** for simplicity. In practice, there may be additional or fewer clients and servers. Also, in some instances, a client may perform the functions of a server and a server may perform the functions of a client.

[00018] Clients **105** may include devices of users that access servers **110-140**. A client **105** may include, for instance, a personal computer, a wireless telephone, a personal digital assistant (PDA), a laptop, a smart phone, a tablet computer, a camera, or another type of computation or communication device. Servers **110-140** may include devices that access, fetch, aggregate, process, search, provide, and/or maintain documents, files, and/or images. Although shown as single components **110, 120, 130, and 140** in Fig. 1, each server **110-140** may be implemented as multiple computing devices, which potentially may be geographically distributed.

[00019] Search server **110** may include one or more computing devices designed to implement a search engine, such as a documents/records search engine, general webpage search engine, image search engines, etc. Search server **110** may, for example, include one or more web servers to receive search queries and/or inputs from clients **105**, search one or more databases in response to the search queries and/or inputs, and provide documents, files, or images, relevant to the search queries and/or inputs, to clients **105**. Search server **110** may include a web search server that may provide webpages to clients **105**, where a provided webpage may include a reference to a hosting server **130** or a web server **140**, at which the desired

information and/or links is located. The references, to the hosting server **130** or web server **140** at which the desired information is located, may be included in a frame and/or text box, or as a link to the desired information/document.

[00020] Document indexing server **120** may include one or more computing devices designed to index files and images available through network **150**. Document indexing server **120** may access other servers, such as hosting servers or web servers that host content, to index the content. Document indexing server **120** may index files/images stored by other servers, such as hosting server **130** or web server **140**, and connected to network **150**. Document indexing server **120** may, for example, store and index content, information, and documents relating to instrument specification data.

[00021] Hosting server **130** and/or web server **140** may each include servers that provide webpages to clients. The webpages may be, for example, HTML-based webpages. A hosting server **130** and/or web server **140** may host one or more websites. A website, as the term is used herein, may refer to a collection of related webpages. Frequently, a website may be associated with a single domain name, although some websites may potentially encompass more than one domain name. The concepts described herein may be applied on a per-website basis. Alternatively, the concepts described herein may be applied on a per-webpage basis.

[00022] While servers **110-140** are shown as separate entities, it may be possible for one or more servers **110-140** to perform one or more of the functions of another one or more of servers **110-140**. For example, it may be possible that two or more of servers **110-140** are implemented as a single server. It may also be possible for one

of servers **110-140** to be implemented as multiple, possibly distributed, computing devices.

[00023] Network **150** may include one or more networks of any kind, including, but not limited to, a local area network (LAN), a wide area network (WAN), a telephone network, such as the Public Switched Telephone Network (PTSN), an intranet, the Internet, a memory device, another type of network, or a combination of networks.

[00024] Although Fig. **1** shows example components of environment **100**, environment **100** may contain fewer components, different components, differently arranged components, and/or additional components than those depicted in Fig. **1**. Alternatively, or additionally, one or more components of environment **100** may perform one or more other tasks described as being performed by one or more other components of environment **100**.

[00025] Fig. **2** is an exemplary diagram of a user/client **105** or server entity (hereinafter called “client/server entity”), which may correspond to one or more of the clients and servers. The client/server entity **105** may include a bus **210**, a processor **220**, a main memory **230**, a read only memory (ROM) **240**, a storage device **250**, one or more input devices **260**, one or more output devices **270**, and a communication interface **280**. Bus **210** may include one or more conductors that permit communication among the components of the client/server entity **105**.

[00026] Processor **220** may include any type of conventional processor or microprocessor that interprets and executes instructions. Main memory **230** may include a random access memory (RAM) or another type of dynamic storage device that stores information and instructions for execution by processor **220**. ROM **240**

may include a conventional ROM device or another type of static storage device that stores static information and instructions for use by processor **220**. Storage device **250** may include a magnetic and/or optical recording medium and its corresponding drive. Storage device **250** may also include flash storage and its corresponding hardware.

[00027] Input device(s) **260** may include one or more conventional mechanisms that permit an operator to input information to the client/server entity **105**, such as a camera, keyboard, a mouse, a pen, voice recognition and/or biometric mechanisms, etc. Output device(s) **270** may include one or more conventional mechanisms that output information to the operator, including a display, a printer, a speaker, etc. Communication interface **280** may include any transceiver-like mechanism that enables the client/server entity **105** to communicate with other devices **105** and/or systems. For example, communication interface **280** may include mechanisms for communicating with another device **105** or system via a network, such as network **150**.

[00028] As will be described in detail below, the client/server entity **105**, consistent with the principles of the invention, may perform certain image recording and printing operations. The client/server entity **105** may perform these operations in response to processor **220** executing software instructions contained in a computer-readable medium, such as memory **230**. A computer-readable medium may be defined as one or more physical or logical memory devices and/or carrier waves.

[00029] The software instructions may be read into memory **230** from another computer-readable medium, such as data storage device **250**, or from another device

via communication interface **280**. The software instructions contained in memory **230** causes processor **220** to perform processes that will be described in greater detail below. Alternatively, hardwired circuitry may be used in place of or in combination with software instructions to implement processes consistent with the principles of the invention. Thus, implementations consistent with the principles of the invention are not limited to any specific combination of hardware circuitry and software.

[00030] Fig. **3** is a diagram of an example of a computing device **300** and a mobile computing device **350**, which may be used with the techniques described herein. Computing device **300** or mobile computing device **350** may correspond to, for example, a client **105** and/or a server **110-140**. Computing device **300** is intended to represent various forms of digital computers, such as laptops, desktops, workstations, personal digital assistants, servers, mainframes, and other appropriate computers. Mobile computing device **350** is intended to represent various forms of mobile devices, such as personal digital assistants, cellular telephones, smart phones, tablet computers, and other similar computing devices. The components shown in Fig. **3**, their connections and relationships, and their functions, are meant to be examples only, and are not meant to limit implementations described herein.

[00031] Computing device **300** may include a processor **302**, a memory **304**, a storage device **306**, a high-speed interface **308** connecting to a memory **304** and high-speed expansion ports **310**, and a low-speed interface **312** connecting to a low-speed expansion port **314** and a storage device **306**. Each of components **302**, **304**, **306**, **308**, **310**, **312**, and **314** are interconnected using various buses, and may be mounted on a common motherboard or in other manners as appropriate. Processor **302** can

process instructions for execution within computing device **300**, including instructions stored in memory **304** or on storage device **306** to display graphical information for a graphical user interface (GUI) on an external input/output device, such as display **316** coupled to high-speed interface **308**. Multiple processors and/or multiple buses may be used, as appropriate, along with multiple memories and types of memory. Also, multiple computing devices **300** may be connected, with each device providing portions of the necessary operations, as a server bank, a group of blade servers, or a multi-processor system, etc.

[00032] Memory **304** stores information within computing device **300**. Memory **304** may include a volatile memory unit or units. Alternatively, memory **304** may include a non-volatile memory unit or units. Memory **304** may also be another form of computer-readable medium, such as a magnetic or optical disk. A computer-readable medium may refer to a non-transitory memory device. A memory device may refer to storage space within a single storage device or spread across multiple storage devices.

[00033] Storage device **306** is capable of providing mass storage for computing device **300**. Storage device **306** may be or contain a computer-readable medium, such as a hard disk device, an optical disk device, or a tape device, a flash memory or other similar solid state memory device, or an array of devices, including devices in a storage area network or other configurations. A computer program product may be tangibly embodied in an information carrier. The computer program product may also contain instructions that, when executed, perform one or more methods, such as those described herein. The information carrier is a computer or machine-readable



medium, such as memory **304**, storage device **306**, or a memory on processor **302**.

[00034] High-speed interface **308** may manage bandwidth-intensive operations for computing device **300**, while low-speed interface **312** may manage lower bandwidth-intensive operations. Such allocation of functions is an example only. High-speed interface **308** may be coupled to memory **304**, display **316**, such as through a graphics processor or accelerator, and to high-speed expansion ports **310**, which may accept various expansion cards. In this implementation, low-speed interface **312** may be coupled to storage device **306** and low-speed expansion port **314**. Low-speed expansion port **314**, which may include various communication ports, such as USB, Bluetooth, Ethernet, wireless Ethernet, etc., may be coupled to one or more input/output devices, such as a keyboard, a pointing device, a scanner, or a networking device such as switch or router, e.g., through a network adapter.

[00035] Computing device **300** may be implemented in a number of different forms, as shown in the figures. For example, computing device **300** may be implemented as a standard server **320**, or in a group of such servers. Computing device **300** may also be implemented as part of a rack server system **324**. In addition, computing device **300** may be implemented in a personal computer, such as a laptop computer **322**. Alternatively, components from computing device **300** may be combined with other components in a mobile device, such as mobile computing device **350**. Each of such devices may contain one or more computing devices **300**, **350**, and an entire system may be made up of multiple computing devices **300**, **350** communicating with each other.

[00036] Mobile computing device **350** may include a processor **352**, a memory **364**, an

input/output (“I/O”) device, such as a display **354**, a communication interface **366**, and a transceiver **368**, among other components. Mobile computing device **350** may also be provided with a storage device, such as a micro-drive or other device, to provide additional storage. Each of the components **352**, **364**, **354**, **366**, and **368** are interconnected using various buses, and several of the components may be mounted on a common motherboard or in other manners as appropriate.

[00037] Processor **352** can execute instructions within mobile computing device **350**, including instructions stored in memory **364**. Processor **352** may be implemented as a chipset of chips that include separate and multiple analog and digital processors. Processor **352** may provide, for example, for coordination of the other components of mobile computing device **350**, such as control of user interfaces, applications run by mobile computing device **350**, and wireless communication by mobile computing device **350**.

[00038] Processor **352** may communicate with a user through control interface **358** and display interface **356** coupled to a display **354**. Display **354** may be, for example, a TFT LCD (Thin-Film-Transistor Liquid Crystal Display) or an OLED (Organic Light Emitting Diode) display or other appropriate display technology. Display interface **356** may include appropriate circuitry for driving display **354** to present graphical and other information to a user. Control interface **358** may receive commands from a user and convert the commands for submission to processor **352**. In addition, an external interface **362** may be provided in communication with processor **352**, so as to enable near area communication of mobile computing device **350** with other devices. External interface **362** may provide, for example, for wired

communications or for wireless communication, and multiple interfaces may also be used.

[00039] Memory **364** may store information within mobile computing device **350**.

Memory **364** can be implemented as one or more of a computer-readable medium or media, a volatile memory unit or units, or a non-volatile memory unit or units.

Expansion memory **374** may also be provided and connected to mobile computing device **350** through expansion interface **372**, which may include, for example, a SIMM (Single In Line Memory Module) card interface. Such expansion memory **374** may provide extra storage space for device **350**, or may also store applications or other information for mobile computing device **350**. Specifically, expansion memory **374** may include instructions to carry out or supplement the processes described herein, and may include secure information also. Thus, for example, expansion memory **374** may be provided as a security module for mobile computing device **350**, and may be programmed with instructions that permit secure use of mobile computing device **350**. In addition, secure applications may be provided via the SIMM cards, along with additional information, such as placing identifying information on the SIMM card in a non-hackable manner.

[00040] Expansion memory **374** may include, for example, flash memory and/or NVRAM memory. A computer program product may be tangibly embodied in an information carrier. The computer program product contains instructions that, when executed, perform one or more methods, such as those described herein. The information carrier may be a computer-or machine readable-medium, such as memory **364**, expansion memory **374**, or a memory on processor **352**, that may be

received, for example, over transceiver **368** or external interface **362**.

[00041] Mobile computing device **350** may communicate wirelessly through communication interface **366**, which may include digital signal processing circuitry where necessary. Communication interface **366** may provide for communications under various modes or protocols, such as GSM voice calls, SMS, EMS or MMS messaging, CDMA, TDMA, PDC, WCDMA, CDMA2000, or GPRS, among others. Such communication may occur, for example, through transceiver **368**. In addition, short-range communication may occur, such as using a Bluetooth, WiFi, or other such transceiver. In addition, GPS (Global Positioning System) received module **370** may provide additional navigation-related and location-related wireless data to mobile computing device **350**, which may be used as appropriate by applications running on mobile computing device **350**.

[00042] Mobile computing device **350** may be implemented in a number of different forms, as shown in the figures. For example, mobile computing device **350** may be implemented as a cellular telephone **380**. Mobile computing device **350** may also be implemented as part of a smart phone **382**, personal digital assistant, or other similar mobile device.

[00043] Various implementations described herein can be realized in digital electronic circuitry, integrated circuitry, specially designed ASICs (application specific integrated circuits), computer hardware, firmware, software, and/or combinations thereof. These various implementations may include implementations in one or more computer programs that are executable and/or interpretable on a programmable system including at least one programmable processor, which may be special or

general purpose, coupled to receive data and instructions from, and to transmit data and instructions to, a storage system, at least one input device, and at least one output device.

[00044] These computer programs, also known as programs, software, software applications, or code, include machine instructions for a programmable processor, and can be implemented in a high-level procedural and/or object-oriented programming language, and/or in assembly/machine language. As used herein, the terms “machine-readable medium” and “computer-readable medium” refer to any apparatus and/or device, such as magnetic discs, optical disks, memory, Programmable Logic Devices (“PLDs”), used to provide machine instructions and/or data to a programmable processor, including a machine-readable medium that receives machine instructions as a machine-readable signal. The term “machine-readable signal” refers to any signal used to provide machine instructions and/or data to a programmable processor.

[00045] The contents of computer-readable medium may physically reside in one or more memory devices accessible by a server. Computer-readable medium may include a database of entries corresponding to instrument specification data.

[00046] To provide for interaction with a user, the techniques described herein may be implemented on a computer having a display device, such as a CRT (cathode ray tube), LCD (liquid crystal display), or LED (Light Emitting Diode) monitor, for displaying information to the user and a keyboard and a pointing device by which the user can provide input to the computer. Other kinds of devices may be used to provide for interaction with a user as well; for example, feedback provided to the user

can be any form of sensory feedback, such as visual feedback, auditory feedback, or tactile feedback; and input from the user may be received in any form, including acoustic, speech, or tactile input.

[00047] The techniques described herein may be implemented in a computing system that includes a back end component, such as a data server, or that includes a middleware component, such as an application server, or that includes a front end component, such as a client computer having a graphical user interface or Web browser through which a user may interact with an implementation of the techniques described herein, or any combination of such back end, middleware, or front end components. The components of the system may be interconnected by any form of medium of digital communication.

[00048] As shown in Fig. 4, a system **400** for synchronizing or updating an instrumentation database is provided. The system **400** comprises an automated process control system **418** and an update server **406** operatively connected to an offline instrumentation database **402** to be updated based on real-time process control instrument specification data. As used herein, an “offline instrumentation database” indicates that the instrumentation database **402** is offline relative to a process control network **410** linking various components of the automated process control system **418**, though the instrumentation database **402** may be connected to another network, such as a business network **408** or another type of network **401** such as the internet. In other words, the instrumentation database **402** is external to the process control network **410** that allows the components of the control system **418** to communicate. The offline database may have intermittent access to the process control network **410**

via a firewall or other network security system that controls access. As used herein, a “business network” refers to an intranet or similar private network.

[00049] The process control system **418** comprises process control servers **412**, a process control database **420**, operator stations **414**, and various controllers **416** for controlling process control elements. The operator stations **414** are typically located inside a control room that functions as a control center or hub for automated control of an industrial process. Thus, real-time operating conditions, including instrument specification data, are typically only available in a centralized location within a facility. The process control system **418** is configured to automatically control a process based on instrument specification data input by an operator of the process control system **418**. Process operators may input specification data via an operator interface on an operator station **414** connected to the process control network **410**. Instrument specification data may include, but is not limited to, alarm settings or setpoints for a process, such as a target flow rate, temperature, pressure, or other target measurement of a process variable or physical property of a process stream. When such data is input via an operator station **414**, controllers **416** may actuate various types of process equipment such as control valves or pumps for controlling the process based on the specification data.

[00050] The update server **406** intermittently accesses instrument specification data utilized by the process control system **418** via the process control network **410**. A non-transitory computer readable medium is coupled to the update server **406** having programming instructions stored thereon, which, when executed by the update server **406**, cause the update server **406** to perform certain operations. The programming

instructions may be carried out by an automated update software application configured to automatically update the offline instrumentation database **402** pending authorized approval of data changes so that instrumentation data stored in the instrumentation database **402** matches real-time instrumentation data utilized by the process control system **418**, which may be stored within a process control database **420** operatively connected to the process servers **412**.

[00051] When the programming instructions are executed, the update server **406** scans or queries **409** the instrument specification data stored on the process control database **420**, which is operably coupled to the process control system **418** and stores real-time specification data for controlling the process, at predefined time intervals to detect changes in the instrument specification data relative to a previous scan of the data. If any changes **411** are detected, the update server **406** then sends an approval request **405** to a manager work station **404** that is accessible to a manager based on a permission level. The manager work station **404** may be any suitable computing device capable of receiving notifications of an approval request and providing user authentication. The work station **404** may be a personal computer, a laptop, a tablet, a smartphone, or a specially designed computing device. Specific managers or supervisors may have different permission levels and work station **404** is configured to authenticate each manager before granting approval **407** to a change request. For instance, some managers may have authority to approve changes in data relating only to certain specified instruments based on the location of the instrument in the facility and/or the manager's particular area of responsibility. Other managers or high-level supervisors may have the authority to approve changes relating to any



instrumentation within a facility.

[00052] Before the update server **406** scans **409** the instrument specification data to synchronize the instrumentation database **402** with real-time data, the server **406** must first connect to the process control database **420** in which the data is stored. A firewall may establish a barrier between the process control network **410**, which provides access to the process control database **420**, and both the update server **406** and the instrumentation database **402**. Firewall security rules may be established to allow the update server **406** to access the process control network **410** only for the purpose of scanning instrument specification data and only at predetermined time intervals. For instance, the update server **406** may access the process control network **410** to scan the process control database **420** once per day at a specified time each day. The instrumentation database **402** may then be updated with all changes **403** that have been approved by authenticated managers in the preceding 24-hour period of time since the previous day's scan. Instrumentation data stored on the instrumentation database **402** may be time-stamped to notify users accessing the data that the currently available data is "real-time" data as of a specified time, preferably within the preceding 24 hours. In alternative embodiments, other suitable means of providing intermittent access to the process control network **410** for the purpose of scanning instrument specification data may be utilized.

[00053] Once a scan of the instrument specification data has detected changes in the data, the update server sends one or more approval requests **405** to one or more relevant managers having the required permission level to approve the request. As each approval request is granted by an authorized manager or supervisor, the update

server **406** may store updated instrument specification data within the instrumentation database **402** so that the data available to users outside of the process control system **418** accurately matches the real-time data utilized by the process control system **418** as of the time of the scan that detects the changes. Thus, the process control database **420** and the instrumentation database **402** are synched once all relevant managers grant one or more approval requests sent to each manager.

[00054] All users in the facility having access to the instrumentation database **402**, such as engineers, process safety managers, and others, will then be able to view up-to-date instrument specification data without the necessity of accessing the data through the process control network **410**, which typically involves utilizing an operator station **414** located in a control room in the facility that may not be convenient at all times. Thus, updated instrument specification data is available at any time from any device having access to the instrumentation database **402** via the business network **408** or another network **401**, such as the internet.

[00055] As shown in Fig. 5, a method **500** for synchronizing or updating instrument specification data between a process control system **418** and an external database **402** is provided. First, instrument specification data is generated by an operator via a process control system **418**. This step may include initial input of data when installing brand new equipment or replacing or updating existing equipment, or more typically involves operators continually updating instrument specification data in real-time in order to optimize the process or correct process upsets. For instance, operators may input specific setpoint values for a target flow rate, temperature, pressure, or other target measurement for a process stream to control the process

within desired parameters. As instrument specification data is changed, real-time data is stored within a process control database **420** operably connected to process servers **412**, which allow operators of the process control system **418** to control the process via an operator station **414** interface. The update server **406** then connects to the process control database **420** and scans the instrument specification data stored within the database **420** at predefined time intervals to detect changes **411** in the data relative to a previous scan of the data.

[00056] A manager having responsibility for granting or rejecting approval requests **405** for changes in instrument specification data creates a manager account requiring a specified permission level to access the account so that the manger may receive approval requests through the account. After scanning **409** the data, the update server **406** then sends an approval request **405** to the manager account if the scan detects at least one change **411** in the instrument specification data. The manager may then review all changes and grant or reject an approval request relating to each individual change. Upon granting the approval request, the update server **406** then stores updated instrument specification data **403** within the instrumentation database **402**.

[00057] Fig. 5 provides a flow chart of an illustrative method for updating the instrumentation database **402**. Step **505** starts the present method **500**. In the first step **510**, at least one maintenance manager may register to create a user profile. Preferably, a plurality of maintenance managers at a facility registers to form a profile for each individual manager with a defined permission level attached to each profile. Each manager may have different permission levels that allow each individual manager to grant change approval requests **405** relating to a specific set of

instruments, which may be located in specific areas of the facility, or to grant approvals facility-wide. Each manager may utilize a graphical user interface on a manager work station **404** or any suitable computing device having access to the automated software application via a business network **408** to create a profile.

[00058] To prevent users having access to the business network **408** but who are not authorized to grant approval requests or do not have the required permission level to grant specific approval requests relating to specific instruments, a user's access to the software application may be limited based on a permission level. Permission levels of individual users are set by administrators based on the user's job responsibilities and internal business protocols. If a user's permission level is sufficient, the user is allowed to grant or reject an approval request **405**. If a user's permission level is insufficient, the user will be denied access to viewing particular approval requests. Some users may have a permission level that only allows the user to grant or reject an approval request, while other users may be able to take additional actions such as manually changing data. A user's permission level may be based on user roles, which allow users registered within the system to access approval requests for particular sets of instruments. For instance, facility managers may have access to approval requests for all instruments in the facility, and engineers may have access to approval requests for a specific set of instruments located within an area of the facility for which the engineer is responsible.

[00059] Once a manager registers with a permission level, in step **515**, authentication may be required via the graphical user interface each time a manager accesses the software application to review any requests to approve changes. Authentication may

be implemented by passcode, password, or any other suitable means of authentication such as biometric authentication.

[00060] In step **520**, the update server **406** connects to the process control database **420** via the process control network **410**. A barrier, such as through a firewall, is established between the update server **406** and the process control network **410**. Established security rules preferably grant the update server **406** access to the process control network **410** only at specified times and only for the purpose of scanning instrumentation specification data. Access may preferably be granted only once per day, at which time the data is scanned for changes. Access may be allowed only for a period of time necessary to complete a scan of all instrumentation data. When the scan **409** is complete, the update server **406** is disconnected from the process control network **410** and thus loses access to real-time operating data of the process control system **418**. Thus, instrument specification data is scanned at recurring scheduled predefined time intervals.

[00061] In step **525**, once the update server **406** is connected to the process control database **420**, the update server **406** scans up-to-date instrument specification data stored in the process control database **420** at the scheduled time. In step **530**, the update server **406** detects changes **411** in instrument specification data based on the scan **409**. In most cases, the scan will result in at least some changes in the data due to process operators continually updating the data during normal operation of the process control system **418** to control the process. However, if no changes are detected in step **530**, the method may end in step **555** until the next scheduled scan, which will then restart the method **500**.

[00062] In step **535**, when changes in the data are detected in step **530**, the update server **406** sends an approval request **405** to a manager having a sufficient permission level to grant or reject the approval request. The server may send a notification to the manager notifying the manager of a pending approval request, which the manager may grant or reject in step **540**. The notification may be through an email having a link to a webpage or other application interface that allows the manager to grant or reject an approval request. The application may display a list of potential changes that have all occurred since the most recent scan. The manager may scroll through the list and view each change in the list. The manager may individually grant or reject any or all of the listed changes in specification data. Each item of change in the list may be linked to a separate webpage displaying additional information about the particular instrument in question if the manager needs any additional information about the instrument to make an informed decision as to grant or reject the request to change the data.

[00063] If the manager grants the approval request in step **540**, in step **545** the update server **406** initiates the updating **403** of the relevant instrument specification data stored within the instrumentation database **402** so that the instrument specification data stored within the instrumentation database **402** matches the real-time instrument specification data stored within the process control database **420** as of the time of the scan **409**. The instrumentation database **402** is updated with all changes that have been approved **407** by authenticated managers in the preceding 24-hour period of time since the previous day's scan. When updating, the updated instrumentation data may be time-stamped to notify users of the date and time of the scan producing the

update.

[00064] The method then ends in step **555** upon completion of updating the instrumentation database **402**. If the manager rejects the change in step **540**, the application may provide the manager with an option to manually input a change in step **550** that is different from the change detected and presented to the manager in step **535**. If the manager declines this option, the method ends in step **555**. If the manager accepts this option, then the instrumentation database **402** is updated in step **545**. In some cases, a manager may override the detected change if, for instance, the manager is familiar with the process control system and knows that the currently detected change is a temporary change and the specification will later be changed to a different value that is known to the manager. Alternatively, the manager may delay acceptance or rejection of the change and request a reminder **552** of the change approval request at a later time. In this case, the manager may receive the notification at a later time in step **535**, which will typically be the next time that a scan is performed on the instrument specification data. The time intervals for scans may be daily, weekly, or monthly depending on preferences.

[00065] During the life of a process control system, the instrumentation specification data stored in the process control database **420** is continually changed by operators of the process control system **418** as part of normal operations for a variety of reasons. The automated software application is programmed to keep this data up to date in the offline instrumentation database **402**. As data is updated, the newly saved and stored data may overwrite existing data as the currently accurate instrumentation data, though previously stored instrumentation data may be retained to create a record of

changes. Thus, facility managers and supervisors may be notified in a timely manner of all changes to the process control system, and if approved by a manager, all changes will be updated in the offline instrument specification database **402** used by facility personnel outside of the process control system **418**.

[00066] The present system for updating a database functions as an automated synchronization tool, though approval for all changes is required for management purposes and industry protocols requiring facilities to document all changes in industrial processes for regulatory and safety purposes. The present system is advantageous in that it eliminates the manpower required to manually update an offline instrument specification database **402**, which is the main repository for specification and design documents when upgrading, expanding, building, or modifying an industrial facility such as a chemical plant, refinery, or manufacturing facility.

[00067] The present automated database synchronization system is a universal system that can communicate with any process control system **418** that utilizes instrument specification data. The present system may be utilized in any type of chemical plant, refinery, paper mill, manufacturing facility, or any other similar type of industrial facility with a process control system using an OPC (open platform communication) gateway for communication. OPC is an industry standard communications protocol available on virtually all automated process control systems that are currently commercially used in industrial facilities. In one example, the system may be used with the DeltaV digital automations system used in many industrial facilities. Systems such as DeltaV may utilize an application programming interface (API) to



extract instrumentation data from the system and manually transfer the data to a new database. The present system utilizes an OPC protocol which may communicate automatically with the API of a process control system such as DeltaV and automatically update the instrumentation database **402** in accordance with the method described herein.

[00068] It will be apparent to one of ordinary skill in the art that aspects of the invention, as described above, may be implemented in many different forms of software, firmware, and hardware in the implementations illustrated in the figures. The actual software code or specialized control hardware used to implement aspects consistent with the present invention is not limiting of the present invention. Thus, the operation and behavior of the aspects were described without references to the specific software code—it being understood that one of ordinary skill in the art would be able to design software and control hardware to implement the aspects based on the description herein.

[00069] What is claimed is:

[00070] A system for automatically synchronizing instrument specification data between a process control system and an external database, said system comprising:

- a process control system configured to automatically control a process based on instrument specification data input by an operator of the process control system, wherein the instrument specification data is stored within a process control database within the process control system;
- an update server operably connected to an instrumentation database external to the process control system; and

a non-transitory computer-readable medium coupled to the update server having programming instructions stored thereon, which, when executed by the update server, cause the update server to perform operations comprising:

- connecting to the process control database via a process control network,
- scanning the instrument specification data at predefined time intervals,
- detecting changes in the instrument specification data relative to a previous scan,
- sending an approval request to a manager work station when the update server detects a change in the instrument specification data, wherein the manager work station is accessible to a manager based on a permission level, and
- storing updated instrument specification data within the instrumentation database when the approval request is granted by the manager.

[00071] The system of claim 1, wherein access to the process control database by the update server is limited by a firewall.

[00072] The system of claim 2, wherein access is based on security rules that allow the update server to connect to the process control database only to scan the instrumentation specification data and only for a period of time sufficient to complete a scan

[00073] The system of claim 1, wherein the update server performs operations further comprising time stamping the updated instrument specification data stored within the instrumentation database.

[00074] A method for automatically synchronizing instrument specification data between a process control system and an external database, said method comprising the steps of:

- a. generating instrument specification data, by an operator, via a process control system;
- b. storing the instrument specification data within a process control database within the process control system;
- c. creating a manager account requiring a permission level to access the account;
- d. connecting, by an update server, to the process control database via a process control network;
- e. scanning, by the update server, the instrument specification data at predefined time intervals;
- f. detecting changes in the instrument specification data relative to a previous scan;
- g. sending, by the update server, an approval request to the manager account when the update server detects a change in the instrument specification data;
- h. granting or rejecting, by a manager accessing the manager account, the approval request; and

- i. storing updated instrument specification data within an instrumentation database that is external to the process control system when the approval request is granted by the manager.

[00075] The method of claim 5, further comprising the step of sending a second approval request to the manager account at a later scheduled time when the approval request is rejected, wherein the second approval request relates to a rejected change in instrument specification data.

[00076] The method of claim 5, wherein the step of creating a manager account comprises creating a plurality of manager accounts having different permission levels relating to different sets of specified process instruments distributed within an automated process.

[00077] The method of claim 5, wherein the step of connecting, by an update server, to the process control database via a process control network comprises intermittently connecting to the process control database at scheduled times based on security rules that allow the update server to connect to the process control only to scan the instrumentation specification data and only for a period of time sufficient to complete a scan.

[00078] The method of claim 5, further comprising the step of time stamping the updated instrument specification data stored within the instrumentation database.

[00079] The method of claim 5, further comprising the steps of repeating the method at a plurality of scheduled times and recording previously stored instrumentation data to create an historical record of data changes.

[00080] The method of claim 5, further comprising the step of manually changing the

instrument specification data stored within the instrumentation database, by the manager, when the approval request is rejected by the manager.

## CLAIMS

What is claimed is:

- 1) A system for automatically synchronizing instrument specification data between a process control system and an external database, said system comprising:
  - a process control system configured to automatically control a process based on instrument specification data input by an operator of the process control system, wherein the instrument specification data is stored within a process control database within the process control system;
  - an update server operably connected to an instrumentation database external to the process control system; and
  - a non-transitory computer-readable medium coupled to the update server having programming instructions stored thereon, which, when executed by the update server, cause the update server to perform operations comprising:
    - connecting to the process control database via a process control network,
    - scanning the instrument specification data at predefined time intervals,
    - detecting changes in the instrument specification data relative to a previous scan,
    - sending an approval request to a manager work station when the update server detects a change in the instrument specification data, wherein the manager work station is accessible to a manager based on a permission level, and

storing updated instrument specification data within the instrumentation database when the approval request is granted by the manager.

- 2) The system of claim 1, wherein access to the process control database by the update server is limited by a firewall.
- 3) The system of claim 2, wherein access is based on security rules that allow the update server to connect to the process control database only to scan the instrumentation specification data and only for a period of time sufficient to complete a scan
- 4) The system of claim 1, wherein the update server performs operations further comprising time stamping the updated instrument specification data stored within the instrumentation database.
- 5) A method for automatically synchronizing instrument specification data between a process control system and an external database, said method comprising the steps of:
  - a. generating instrument specification data, by an operator, via a process control system;
  - b. storing the instrument specification data within a process control database within the process control system;
  - c. creating a manager account requiring a permission level to access the account;
  - d. connecting, by an update server, to the process control database via a process control network;

- e. scanning, by the update server, the instrument specification data at predefined time intervals;
  - f. detecting changes in the instrument specification data relative to a previous scan;
  - g. sending, by the update server, an approval request to the manager account when the update server detects a change in the instrument specification data;
  - h. granting or rejecting, by a manager accessing the manager account, the approval request; and
  - i. storing updated instrument specification data within an instrumentation database that is external to the process control system when the approval request is granted by the manager.
- 6) The method of claim 5, further comprising the step of sending a second approval request to the manager account at a later scheduled time when the approval request is rejected, wherein the second approval request relates to a rejected change in instrument specification data.
- 7) The method of claim 5, wherein the step of creating a manager account comprises creating a plurality of manager accounts having different permission levels relating to different sets of specified process instruments distributed within an automated process.
- 8) The method of claim 5, wherein the step of connecting, by an update server, to the process control database via a process control network comprises intermittently connecting to the process control database at scheduled times based on security



rules that allow the update server to connect to the process control only to scan the instrumentation specification data and only for a period of time sufficient to complete a scan.

- 9) The method of claim 5, further comprising the step of time stamping the updated instrument specification data stored within the instrumentation database.
- 10) The method of claim 5, further comprising the steps of repeating the method at a plurality of scheduled times and recording previously stored instrumentation data to create an historical record of data changes.
- 11) The method of claim 5, further comprising the step of manually changing the instrument specification data stored within the instrumentation database, by the manager, when the approval request is rejected by the manager.

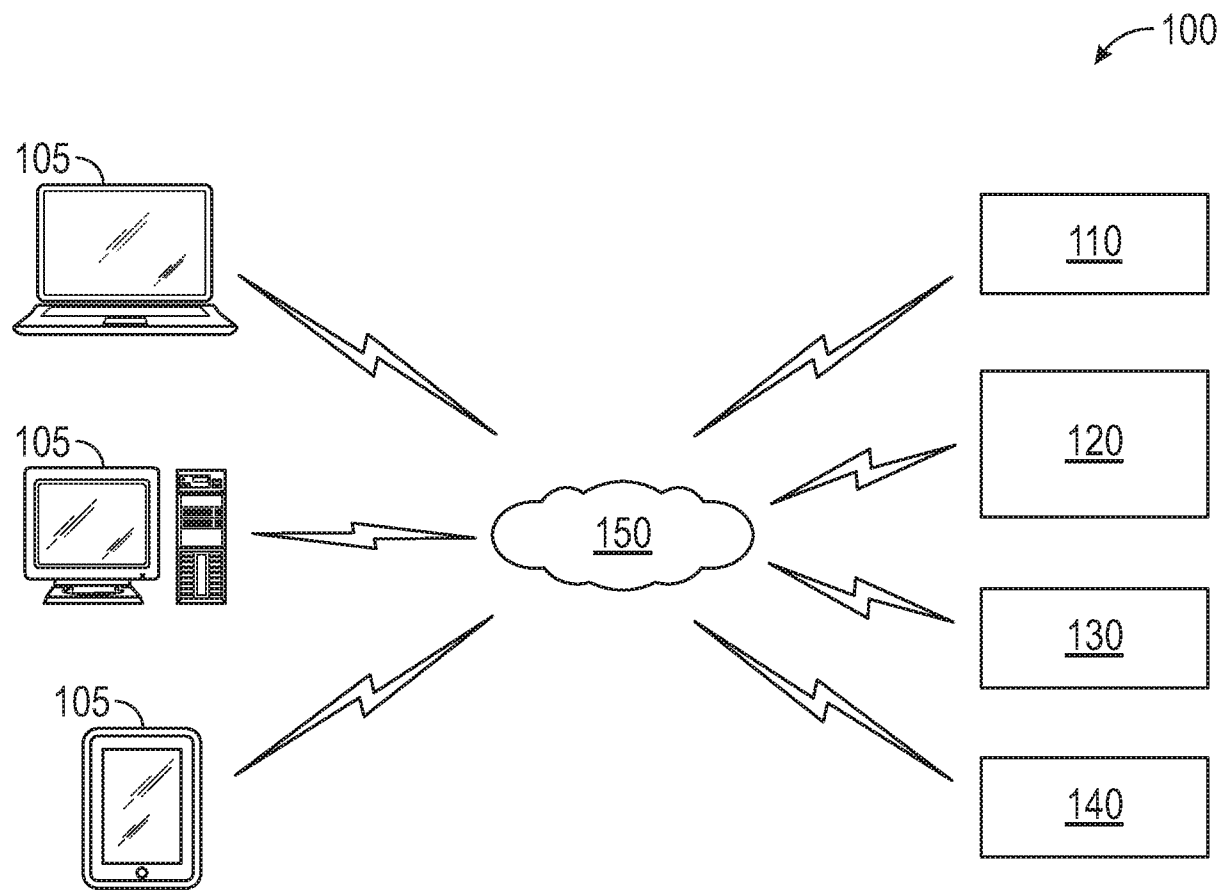


FIG. 1

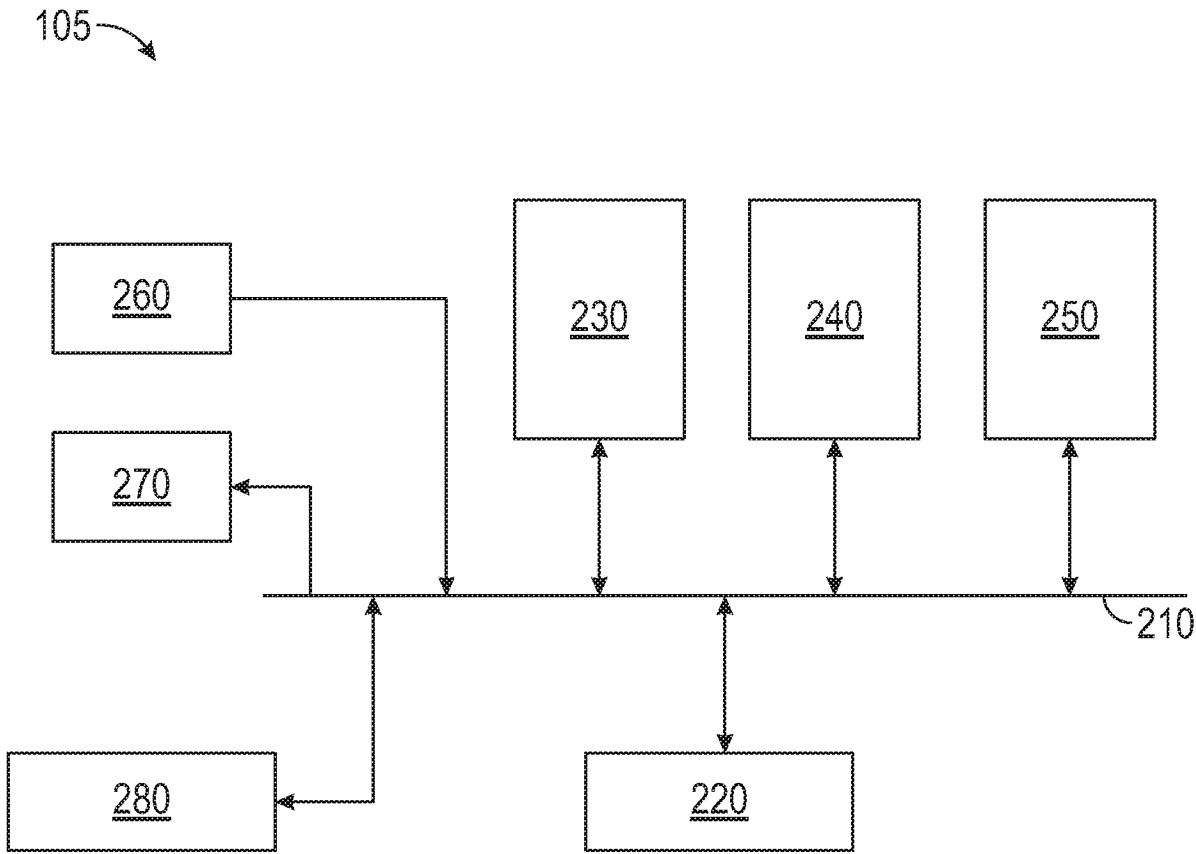


FIG. 2

3/5

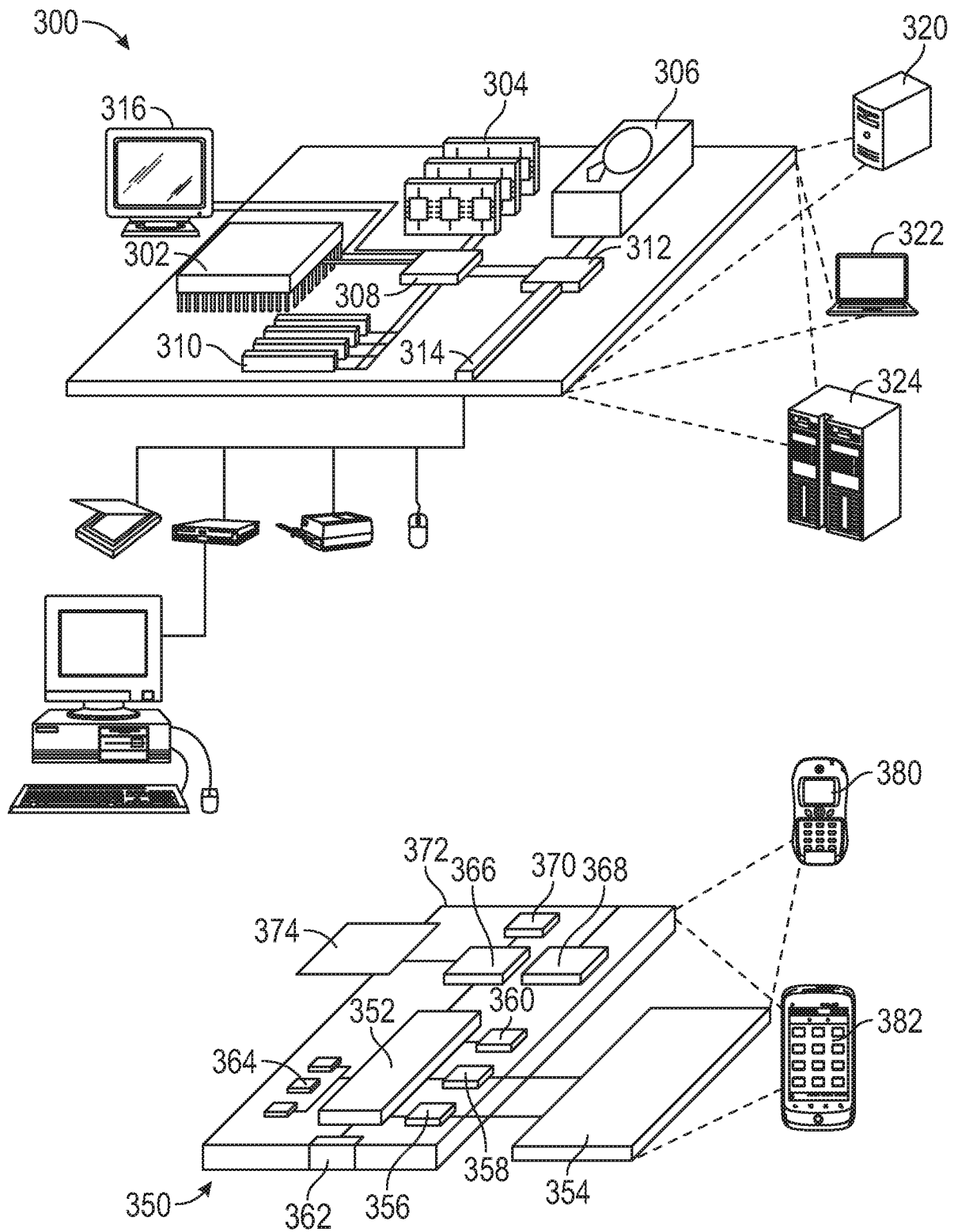
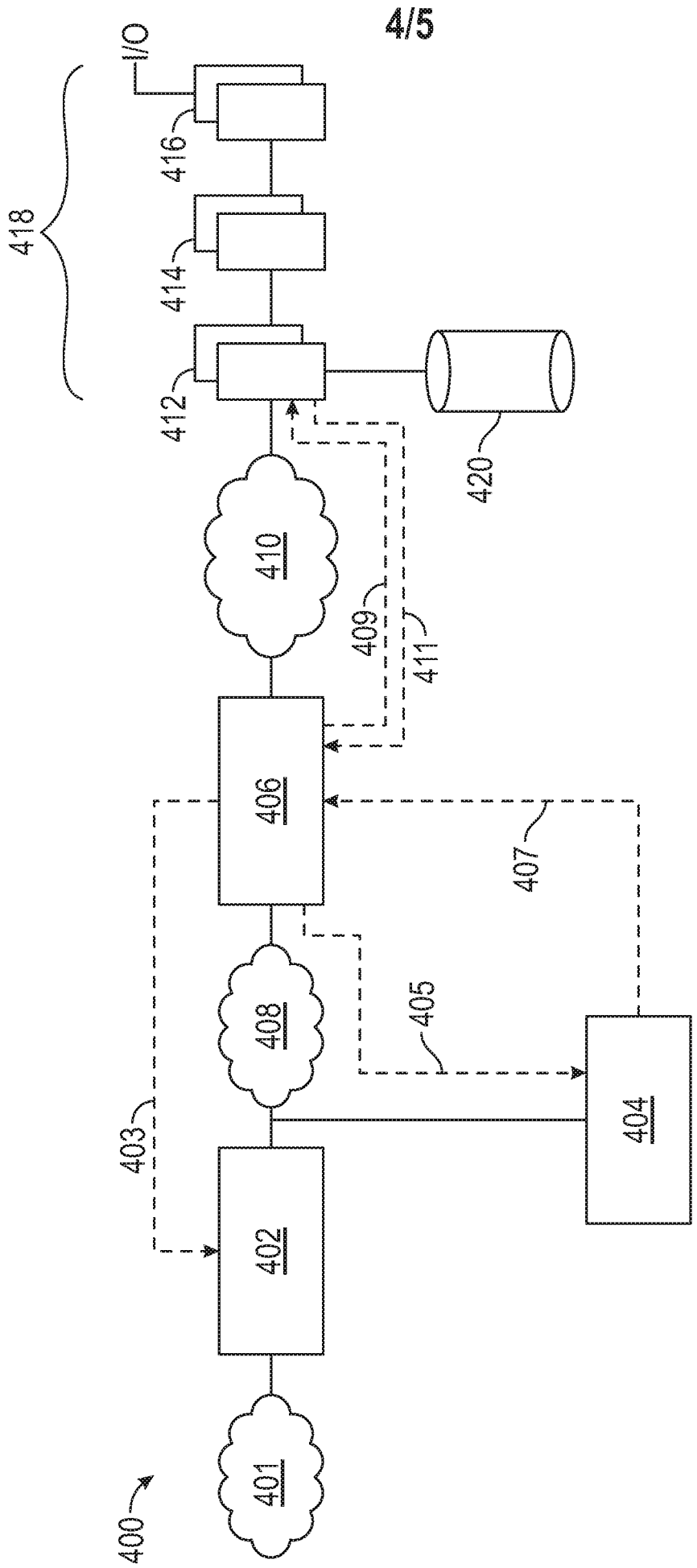


FIG. 3



4/5

FIG. 4

5/5

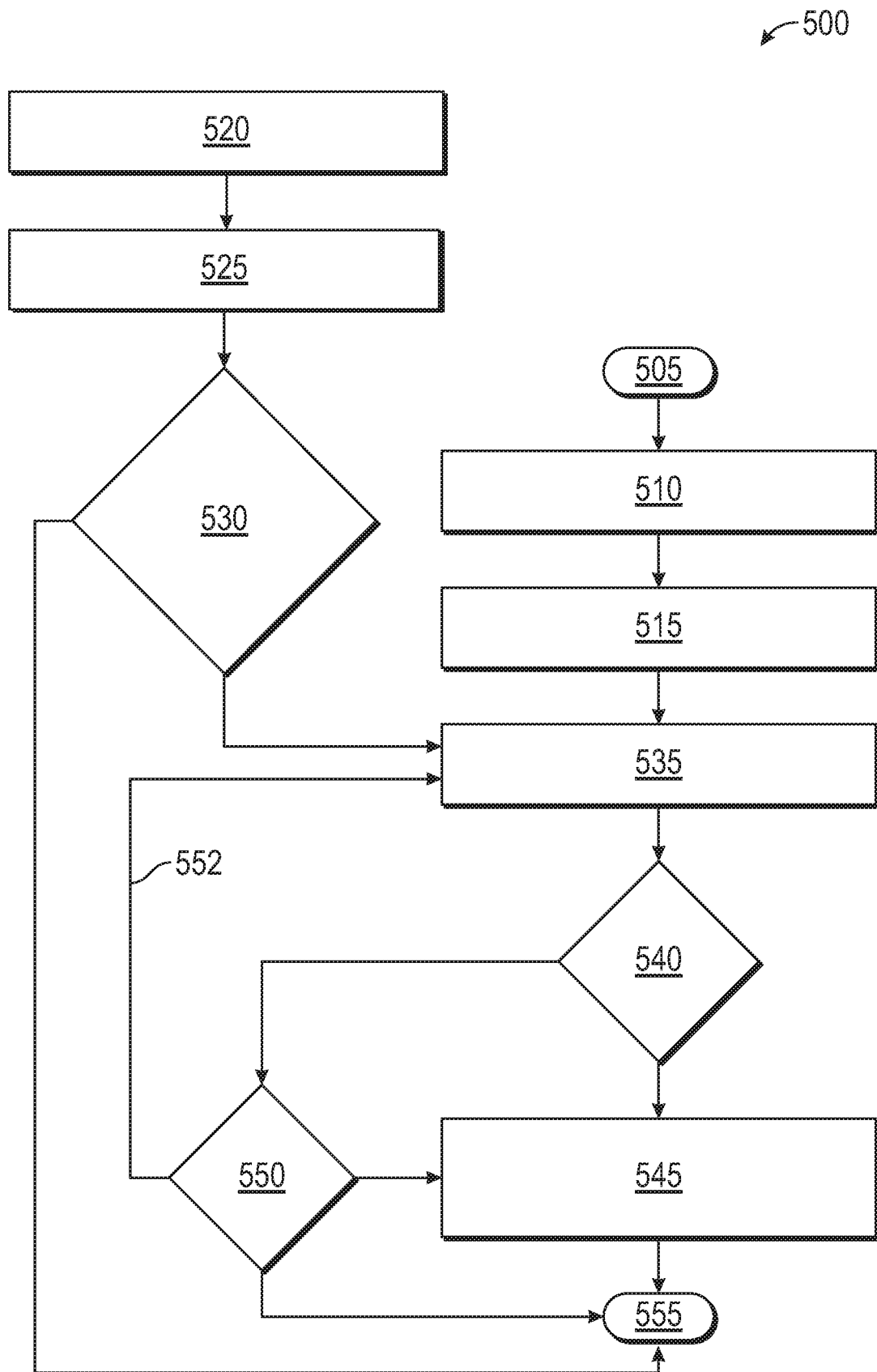


FIG. 5

**A. CLASSIFICATION OF SUBJECT MATTER****G05B 19/05(2006.01)i, G05B 19/4155(2006.01)i, G05B 19/418(2006.01)i**

According to International Patent Classification (IPC) or to both national classification and IPC

**B. FIELDS SEARCHED**

Minimum documentation searched (classification system followed by classification symbols)

G05B 19/05; G06F 10/00; G06F 11/14; G06F 17/30; G06F 3/06; G05B 19/4155; G05B 19/418

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Korean utility models and applications for utility models

Japanese utility models and applications for utility models

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

eKOMPASS(KIPO internal) &amp; keywords: synchronizing, database, scan, predefined time interval, change, approval, update

**C. DOCUMENTS CONSIDERED TO BE RELEVANT**

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
Y	US 2010-0179941 A1 (VIJAY H. AGRAWAL et al.) 15 July 2010 See paragraphs [0028]–[0075]; and figures 1–3.	1–11
Y	US 2010-0011001 A1 (CHRISTOPHER NEIL HOMES) 14 January 2010 See paragraphs [0019], [0037]–[0041]; claim 1; and figure 1.	1–11
A	US 2016-0210202 A1 (COMVAULT SYSTEMS, INC.) 21 July 2016 See paragraphs [0200], [0215]–[0236]; claim 1; and figures 1A–1E.	1–11
A	US 7191284 B1 (VIKAS K. GUPTA et al.) 13 March 2007 See column 6, line 56 – column 9, line 18; and figures 3–4.	1–11
A	US 7359927 B1 (JOHN CARDENTE) 15 April 2008 See column 7, line 46 – column 9, line 10; and figures 2–3.	1–11



Further documents are listed in the continuation of Box C.



See patent family annex.

\* Special categories of cited documents:

"A" document defining the general state of the art which is not considered to be of particular relevance

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"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)

"O" document referring to an oral disclosure, use, exhibition or other means

"P" document published prior to the international filing date but later than the priority date claimed

"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

"&amp;" document member of the same patent family

Date of the actual completion of the international search

25 July 2019 (25.07.2019)

Date of mailing of the international search report

**25 July 2019 (25.07.2019)**

Name and mailing address of the ISA/KR

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**INTERNATIONAL SEARCH REPORT**

Information on patent family members

International application No.

**PCT/US2019/026139**

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