# Instructions for localizing an Asset Based PI Example Kit

## Localization of the FULL AF database and related files

For localizing the FULL AF database, which is essentially a self-contained demo, setting up and configuring the database to its functioning state with running analyses and demo date will help identify attributes and analyses that have not picked up changes or were missed during translation.

1. Import the FULL database XML into a new AF database and set up per the instructions in the User Guide.
   1. Make sure the AF Server and Analysis Service are of the minimum required version.
   2. Review through the installation, including the visualization, to make sure there are no errors and that analyses are running correctly.
2. Translate the contents of the Library plug-in (templates, tables, categories, enumeration sets, etc.)
   1. In the element templates, translate the attribute templates and analysis templates.
      1. Changes to an attribute template name may not be picked up by any analyses that use that attribute as an input or an output. Changes to the attribute names in the analyses may need to be made manually.
      2. If needed, the substitution parameter naming scheme for new PI tags should be changed to meet local practices and character requirements. For example *OSIDemo\_%Element%.%Attribute%.%ID%* could be changed to *OSIDemo.%ID%* for languages that do not use the Roman alphabet or are difficult to translate.
   2. Changes to the enumeration sets, tables, categories, etc., may also impact whether analyses continue to work. Always check to make sure that changes have been picked up.
3. Translate the names of elements in the Elements plug-in (i.e. the hierarchy).
4. Translate any new UoMs (if applicable).
5. Translate the description of the database. (Databases > right-click > Properties)
6. After the AF database has been updated and everything looks good in PSE, translate the contents of any accompanying PI ProcessBook displays or PI DataLink spreadsheets.
   1. Element and attribute names may need to be manually corrected.
   2. Please note that some PI DataLink spreadsheets will be difficult to localize (for example, the spreadsheet included with the Load Forecasting example kit). Contact your Theater Learning Lead and the Example Kit Program Manager on whether that particular visualization can be excluded from the localized kit.
   3. Save the localized visualization file with *\_<language>* appended to the end.

### Generate a new FULL database XML file

Creation of the XML file needs to be done a certain way to ensure that all of the assets are based on the template at the time of the export, and the UoM database will not be included in the export.

Both of these are needed to ensure that the end user does not run into any issues when setting up their example kit.

* 1. In the localized database, do a “Reset to Template” on all of the non-static attributes in all of the assets, including the *PI Data Archive* asset. This is to ensure that any troubleshooting steps, mistypes, etc. done during localization do not get passed along into the final XML file.
  2. If possible, do not reset the static attributes! This would eliminate unique values that make the FULL DB interesting.
  3. It's easiest to do this by doing an Attribute Search for all of the attributes, ordering by data types, and selecting several rows at attributes at once. The comprehensive Attribute Search is also a good view for checking the attribute settings or making sure they are on the template.
     1. NOTE: Attributes marketed as hidden will NOT show up in an Attribute Search, even in PSE. Unfortunately, you will need to search for these manually and do a “Reset to Template.”
  4. If there are a lot of hidden attributes, another way to do this is by going to the individual elements, selecting all the non-static attributes, and resetting them to template.
  5. An easy way to confirm that all PI Point data reference attributes are on the template is to see if they are showing the error “PI Server ’Enter\_Your\_PIDataArchive\_Name’ not found” (or similar error).

1. Export the database from the Library plug-in. Do not have anything selected during the export.
   1. In particular, we do not want the “Include all referenced objects” checked, as this would include the UOM database. Any UOMs used specifically by the use case that are not part of the normal AF installation should be included as a separate XML.
   2. We do not want the “Simplify configuration strings” checked, as this will hard-code the name of the PI Data Archive into the XML file.
   3. If creating a file for the final kit (published to the Download Center), name it *OSIDemo\_FULL\_<Industry code>\_<Kit description>\_<language>.xml*.

## Localization of the BASIC AF database and related files

Less work is needed for localizing the BASIC AF database, as this database does not create tags, run analyses, or use any visualization.

1. Import the BASIC database XML into a new AF database.
   1. Make sure the AF Server and Analysis Service are of the minimum required version.
2. Translate the contents of the Library plug-in (templates, tables, categories, enumeration sets, etc.). Use the name translated names, etc. as used in the FULL database.
   1. In the element templates, translate the attribute templates and analysis templates.
      1. Please note that changes to an attribute template name may not be picked up by any analyses that use that attribute as an input or an output. Changes to the attribute names in the analyses may need to be made manually.
   2. Changes to the enumeration sets, tables, categories, etc., may also impact whether analyses continue to work. Always check to make sure that changes have been picked up.
3. Translate the names of elements in the Elements plug-in (i.e. the hierarchy).
4. Translate any new UoMs (if applicable).
5. Translate the description of the database. (Databases > right-click > Properties)

### Generate a new BASIC database XML file

Creation of the XML file needs to be done a certain way to ensure that all of the assets are based on the template at the time of the export, and the UoM database will not be included in the export.

Both of these are needed to ensure that the end user does not run into any issues when setting up their example kit.

1. In the localized database, do a “Reset to Template” on all of the non-static attributes in all of the assets, including the *PI Data Archive* asset. This is to ensure that any troubleshooting steps, mistypes, etc. done during localization do not get passed along into the final XML file.
   1. If possible, do not reset the static attributes.
   2. It's easiest to do this by doing an Attribute Search for all of the attributes, ordering by data types, and selecting several rows at attributes at once. The comprehensive Attribute Search is also a good view for checking the attribute settings or making sure they are on the template.
   3. NOTE: Attributes marketed as hidden will NOT show up in an Attribute Search, even in PSE. Unfortunately, you will need to search for these manually and do a “Reset to Template.”
   4. If there are a lot of hidden attributes, another way to do this is by going to the individual elements, selecting all the non-static attributes, and resetting them to template.
   5. An easy way to confirm that all PI Point data reference attributes are on the template is to see if they are showing the error “PI Server ’Enter\_Your\_PIDataArchive\_Name’ not found” (or similar error).
2. Export the database from the Library plug-in. Do not have anything selected during the export.
   1. In particular, we do not want the “Include all referenced objects” checked, as this would include the UOM database. Any UOMs used specifically by the use case that are not part of the normal AF installation should be included as a separate XML.
   2. We do not want the “Simplify configuration strings” checked, as this will hard-code the name of the PI Data Archive into the XML file.
   3. If creating a file for a final kit (published to the Download Center), name it *OSIDemo\_BASIC\_<Industry code>\_<Kit description>\_<language>.xml*.

## Perform a QA on the new files

The purpose of the QA is to ensure that the AF databases can be installed and configured by the end user with minimal error, following the instructions in the User Guide. If a VM with a current, unmodified PI System is not available to you, contact the Example Kit Program Manager to get access to a testing VM. You will need all the files that go in to the final kit, including the User Guide. A list of the files is located in the User Guide Introduction.

### Initial Set-up

Work through the following instructions and correct things as needed on the working AF databases (e.g. the databases in which the original localization we completed). Recreate and retest the XML and visualization files until the databases can be installed and configured without any errors.

1. Check both the BASIC and FULL XML files to make sure they do not include the UOM Database definitions.
   1. This can be done by searching for <UOMDatabase> in the files.
   2. If you find the XML contains a UOM database definition – recreate the XML following the above instructions.
2. Following the instructions in the kit User Guide, set up the example kit databases as described step-by-step in Chapters 2 and 3.
   1. Do not make any changes to the kit or the files before starting. We want to capture any mistakes in the instructions or issues with the XML files.
   2. Act as if you were a customer setting up a kit for the first time, and while you have a working knowledge of PI AF and the PI Data Archive, act as if you are not an expert.
   3. Whenever you run into an error or issue, fix it in your original working database.
   4. Note that during the BASIC database setup (Chapter 2), you will not need to make any changes to the database past step 3; the additional steps are describe how the database may be modified and adapted for the customer’s scenario.
3. If an instruction doesn't make sense or could be better worded, record it.
   1. This can be documented in the Word document will all the other issues, or directly in the User Guide with a comment or tracked changes.
4. Once the FULL database is set up, also follow the instructions in Chapter 3 of the User Guide for setting up any PI ProcessBook displays or PI Datalink workbooks.
   1. As before, correct any issues in your original working files.
5. After setting up both the BASIC and the FULL databases following the instructions in the User Guide, review the installed databases for an unexpected errors such as incorrectly configured attributes or analyses in error. If something doesn't look correct, identify the cause and correct it in the original working files.
   1. The BASIC database should show errors relating to “PI Point not found …” Remember that there are no instructions to create tags. Review any other errors to make sure they only relate to the lack of PI tags or live data.

The FULL database should not have any errors.

### Reviewing the User Guide

1. Read through the User Guide and check for spelling, punctuation, format, or grammar errors.
   1. Document any issues in a Word file/email/etc. or feel free to edit the User Guide directly. Make sure that you having the "Track Changes" feature turned on.
   2. Document/correct any references to PI products that do not follow the OSIsoft Corporate Style Guide. The Guide can be found in the “Important Marketing Links” section of the [Marketing.Home](https://osisoft1980.sharepoint.com/sites/marketing/SitePages/Home.aspx) SharePoint page.
2. Update all fields in the User Guide by selecting the entire document (Ctrl + A) and hitting F9.
   1. Review through the document and look for the error: **Error! Reference source not found…**
   2. Correct the field.