Foxboro®

by Schneider Electric

I/A Series® System

Report Package User's Guide

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Preface

This document describes all aspects of the I/A Series® Report Package including:

- Defining data sources and aliases
- Building production reports
- Scheduling reports
- Running reports.

Audience

This guide is intended for process control engineers and operators, and other qualified and authorized personnel involved in using production reports and scheduling report execution using the I/A Series Report Package.

This document is organized to reflect a typical sequence of actions in setting up a system. The appendices provide examples of configuration files, report types, and macros.

What You Should Know

Prior to using this document, you should be familiar with the I/A Series system. Detailed information for the software and the hardware is found in the full documentation set for I/A Series systems.

Prior to using this document, you should be familiar with the AIM*AT™ Series system. Detailed information for the software and the hardware is found in the full documentation set for the AIM*AT Series system.

Revision Information

For Release H, the following changes were made:

Global

- Updated the document to implement new corporate and product branding.

Safety Considerations

Safe use of this product depends largely upon proper installation, use, and maintenance. This manual provides the information needed to properly install, use, and maintain the I/A Series Report Package.

Request for Comments

Please direct your comments and suggestions concerning the I/A Series Report Package to:

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1. Installing the I/A Series Report Package

This chapter describes how to install I/A Series Report Package.

Overview

The I/A Series Report Package is an interactive, easy-to-use tool that allows users to build production reports and schedule the report execution. It runs on a Windows workstation using the Microsoft® Excel environment. Configured reports are Excel files which can be formatted using standard tools. Automize is an event-driven scheduling software that allows scheduling of reports to run on a shift, daily, weekly, monthly or on-demand basis.

The I/A Series Report Package can generate reports that can be accessed over an Intranet using a standard Web Browser, or automatically e-mailed to predefined recipients.

System Requirements

The I/A Series Report Package requires the following:

- Pentium® Processor with 64 MB RAM. (128 MB if installed on an I/A Series station)
- Windows XP, Windows 2000 Service Pack 2, Windows Server 2003, Windows 7, or Windows Server 2008 R2 Standard
- Microsoft Excel 2000, Microsoft Excel 2002, Microsoft Excel 2003, Microsoft Excel 2007 or Microsoft Excel 2010. The latest Excel service pack available from Microsoft has to be installed

NOTE

The Report Package is only compatible with the 32-bit versions of Excel. The 64-bit versions are not supported.

- ODBC Driver for AIM*Historian.

The AIM*Historian ODBC Driver requires the following:

- I/A Series Historian or AIM*Historian™ version 3.1.2, 3.2.4, 3.3.X or 3.4 with authorization for one ODBC client
- Accessed I/A Series stations can be I/A Series Model 51 (Solaris™) at release 4.x or later or I/A Series 70 (NT) at release 6.x or later
- Accessed I/A Series stations require a second Ethernet card.

The following sections explain how to perform these tasks:

- Configure Excel for use with the I/A Series Report Package
- Installing the ODBC Driver for AIM*Historian
- Installing the Automize Scheduler
- Running the I/A Series Report Package Setup Program

Updating from Previous Versions

If you already have a previous version of the Report Package installed, the following steps are necessary before continuing the installation:

- Make sure that your system is running a supported version (see “System Requirements” on page 1) of the Windows operating system, Microsoft Excel and AIM* Historian. Also make sure that you have the latest service packs installed.
- Backup the Report Package data files to a temporary location.
- Copy report_builder_cfg.xls, rb.ini and folders \reports, \report_templates, \done_reports, and \html located in the installation directory of your existing Report Package installation.
- Print out any custom Opalis scheduled tasks. This can be useful when re-creating them with the Automize scheduler
- Uninstall your existing version of the Report Package.
- Start > Control Panel > Add/Remove Programs (Windows XP/2003)
- Start > Control Panel > Programs and Features (Windows 7)
- If the old installation directory is not removed completely by the uninstall program it has to be manually deleted.
- Uninstall the Opalis scheduler

The installation can now be continued as described in the sections below.

After the installation of the Report Package, restore the Report Package data files which have been previously backed up. Therefore copy all backed up files and folders into the directory of the new Report Package installation, overwriting existing files.

If you are updating from Report Package version 5.0 or earlier the report files have to be updated. Please see “Updating Existing Reports” on page 79 for instructions.

Configuring Excel

The I/A Series Report Package requires the following Excel Add-Ins and features to be installed and configured for use with the I/A Series Report Package.

Graphics Filters

The commonly-used Graphics Filters are installed by default during the installation of Excel. Do not remove this option from the "Common Tools" section during the installation.

— NOTE

For Excel, the Internet Assistant VBA Add-In is not required by the I/A Series Report Package, and at runtime, should be left unselected.

Disable Excel Macro Protection

In addition to configuring Excel Add-Ins and features, macro protection must be disabled.

Excel 2010

1. Choose **File > Options > Trust Center > Trust Center Settings > Macro Settings**.
2. On the Macro Settings page, Select the **Enable all macros** option button.

Excel 2007

1. Choose **Click Office icon (top left) > Excel Options > Trust Center Settings > Macro Settings.**
2. On the Macro Settings page, Select the **Enable all macros** option button.

Excel 2000, 2002 (XP) and 2003

1. Choose T**ools > Macro > Security.**
2. On the Security Level page, click the **Low** option button.

MS Excel Service Pack

Verify that you have the latest service pack for the installed version of Microsoft Excel installed. Service packs include important bug fixes and security patches. Specifically, the Report Package will not run properly with Excel 2003 and 2007 without any installed service packs.

(When running a report the application will exit with an error message)

Installing the ODBC Driver for AIM*Historian

The I/A Series Report Package is shipped with an AIM*AT Information Suite CD-ROM that includes an ODBC Driver for AIM*Historian. The driver provides PC clients with access to the I/A Series Historian and AIM*Historian databases. The driver can be installed as a sub-component of either AIM*DataLink™ or AIM*Historian. Please refer to the *I/A Series Information Suite AIM*AT Installation Guide* (B0193YM) and install the sub-components ODBC client and AIM*API™ Admin.

Creating ODBC Data Sources

When installing the ODBC Driver for AIM*Historian, the AIM*AT Setup program automatically configures AIM*AT Historian as a User Data Source Name (DSN) so that individual users can connect to historians by selecting that DSN.

Setting up the driver as a system service, requires that you configure system DSNs.

To configure the driver as a system service:

1. For Windows XP/2003 select **Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.
   - For Windows 7 32-bit select **Start > Control Panel > System and Security > Administrative Tools > Data Sources (ODBC)**.
   - For Windows 7 64-bit select **Start > Run** and enter the following command: **C:\Windows\SysWoW64\Odbcad32.exe.** Click **OK** to start the ODBC configurator.

   Windows opens the **ODBC Data Source Administrator** dialog box with the User DSN page displayed.

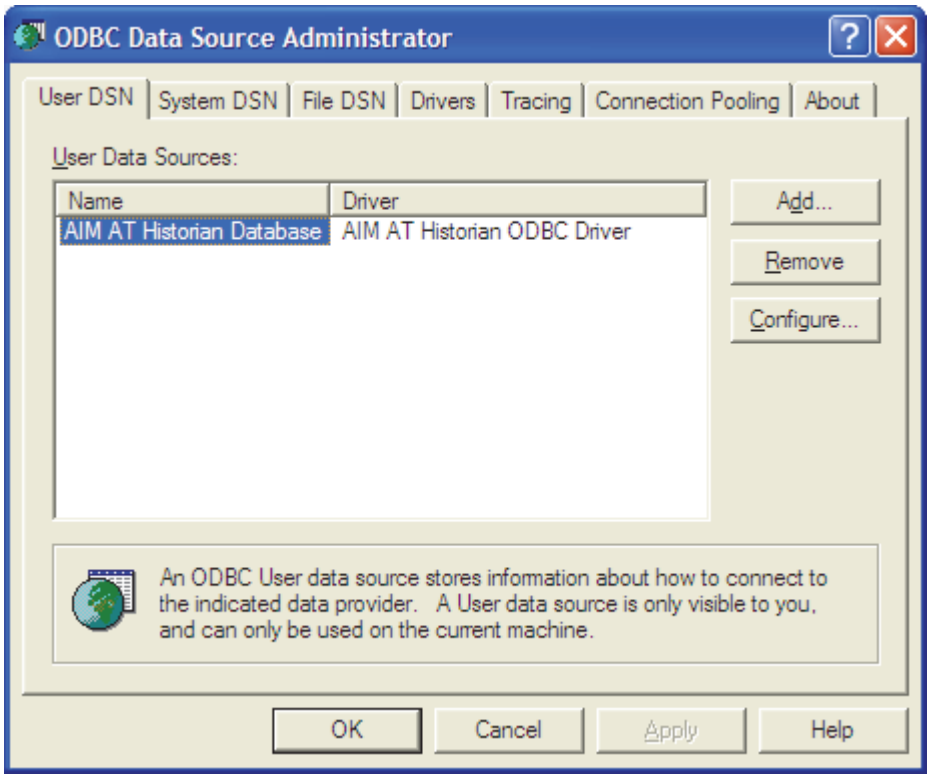


Figure 1-1. ODBC Data Source Administrator Dialog Box

2. Select **AIM AT Historian Database.**
3. Click **System DSN** to display system data sources.
4. Click **Add**.

The **Create New Data Source** dialog box appears, listing available data sources.

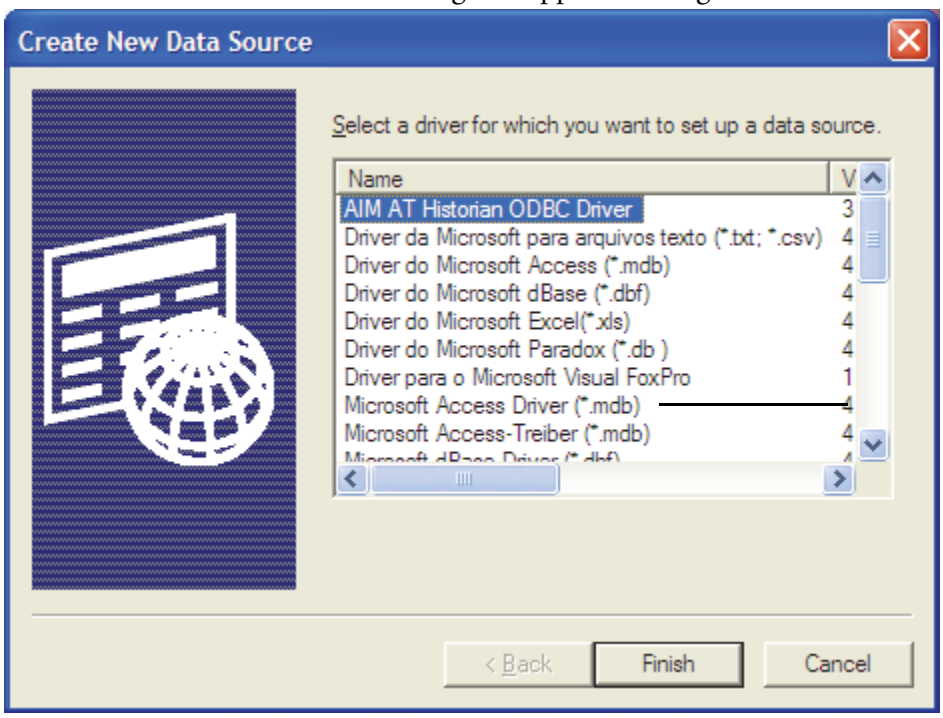
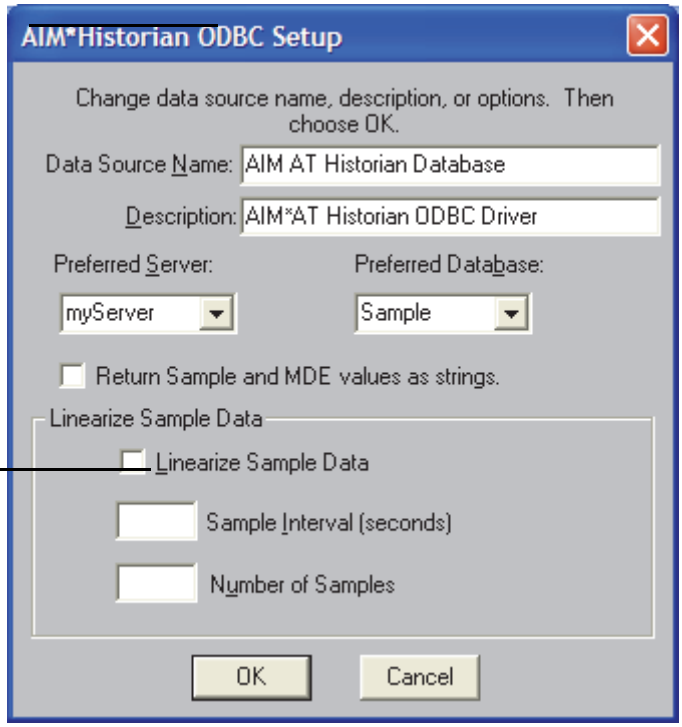


Figure 1-2. Create New Data Source Dialog Box

5. Select **AIM AT Historian ODBC Driver** to set up the data source and click Finish. The **ODBC Setup** dialog box opens.



Sample Database, or Reduction Database

For Linearized Sample Data

Figure 1-3. AIM*Historian ODBC Setup Dialog Box

6. Enter a name for the new data source in the Data Source Name field.

   The suggested format is the historian name + the database name.
7. Enter a description in the Description field.
8. Use the pull-down menus to select the appropriate server (the ODBC driver supports 6-character server names) and the database type.
9. Click **OK**.

   The ODBC Data Source Administrator dialog box returns.
10. Click **OK** to exit the administrator.

For every Historian server you access, four types of System DSN data sources should be created:

- To access Reduction data
- To access non-linearized Sample data
- To access linearized Sample data
- To access String Sample data

To create a linearized sample data System DSN ODBC:

1. Click the **Linearize Sample Data** check box.
2. Set the Sample Interval to **60** seconds
3. Set the Number of Samples to **500**.

Installation Components

The Automize and I/A Series Report Package software are installed using separate Setup programs. The Report Package CD-ROM contains the following components:

- Step1_mize.exe
- Step2_RptPkg_setup.exe
- ReleaseNotes_ReportPackage5_2.pdf
- Users Guide.pdf

In addition, the following media are shipped with the I/A Series Report Package installation CD-ROM:

- *I/A Series Information Suite AIM*AT Installation Guide* (B0193YM)

Before installing, log on to the computer with Administrator privileges.

The Automize Setup program must be run before the I/A Series Report Package Setup program.

When upgrading the I/A Series Report Package from a version older than the version 5.2, you must re-build the existing OpalisRobot Events and Tasks as new Automize Tasks and subsequently uninstall the OpalisRobot software. In addition, the user-built templates and reports can be carried over and then updated as shown in Appendix D "Updating Existing Reports".

If an AIM*AT upgrade occurs after installing I/A Series Report Package, Report Package should be uninstalled and then re-installed. Back-up files report_builder_cfg.xls, rb.ini and folders \reports, \report_templates, \done_reports, and \html prior to uninstalling and restore them after re-installation, overwriting the re-installed versions.

Installing the Automize Scheduler

To install the Automize scheduler program:

1. Exit other Windows programs before running the Automize setup program.
2. Insert the Report Package CD-ROM.
3. Navigate to the root folder of the CD and run the Step1_mize.exe program following the instructions on the screen. Keep the default settings during the installation.
4. **This step is only applicable on Windows 7 based systems!**

   On the desktop, right-click on the Automize9 shortcut and select **Properties**.

   In the Compatibility tab, check the box next to "Run the program as administrator" as shown in **Error! Reference source not found**. Make sure to start Automize only through this desktop shortcut in the future.

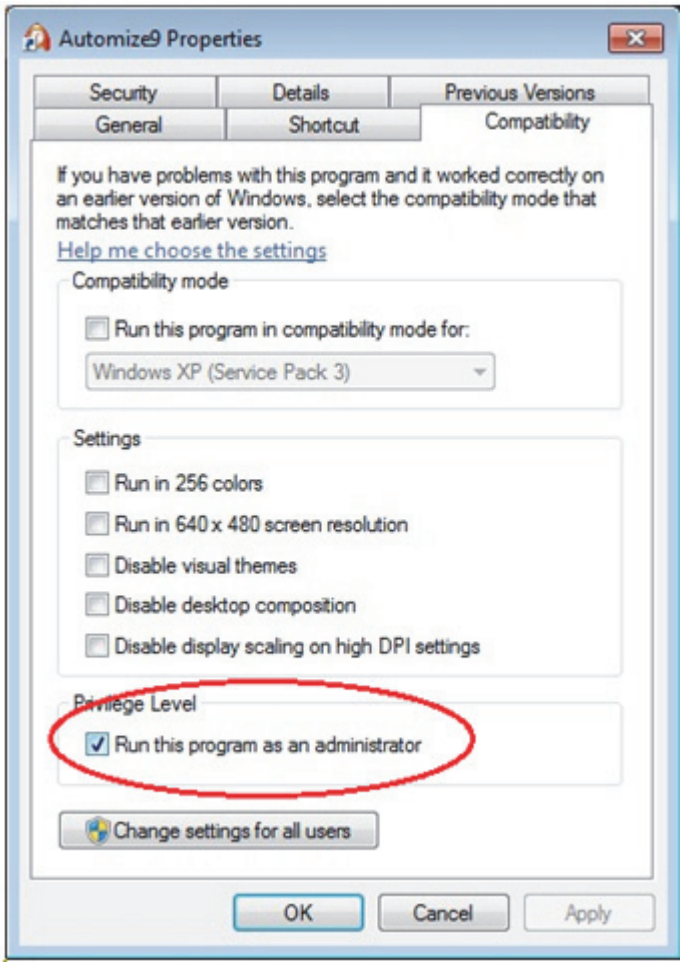


Figure 1-4. Run Automize as Administrator (Windows 7 Only)

5. Start the Automize application.
6. At the first start you will be asked to select the Edition of the Automize application to be used. Keep the default selection **Standard** and click **Save** to close the pop-up window.

7. You must now register Automize9. The Automize registration form is automatically displayed at start time if the software has not been registered yet.

   Open **Start > Programs > Automize9 > Automize9**

Figure 1-5. Automize9 Registration form

NOTE

The registration can be skipped at this point by clicking on "Close". This will start a full-feature 30-day trial of Automize. The registration key might be entered later at any time.

8. Accept the license terms.
9. Select Standard Edition.
10. Enter the registration key provided with your installation pack.
11. Click **Enter Key.**

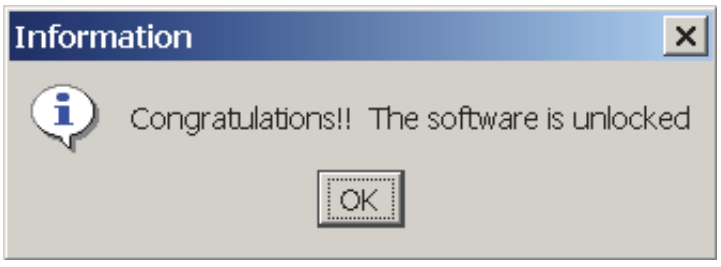


Figure 1-6. Automize9 Registration Confirmation

You must now configure the Automize scheduler to run as a service.

12. Click menu **Engine > NT Service Module > Register 9.x Service Control.**

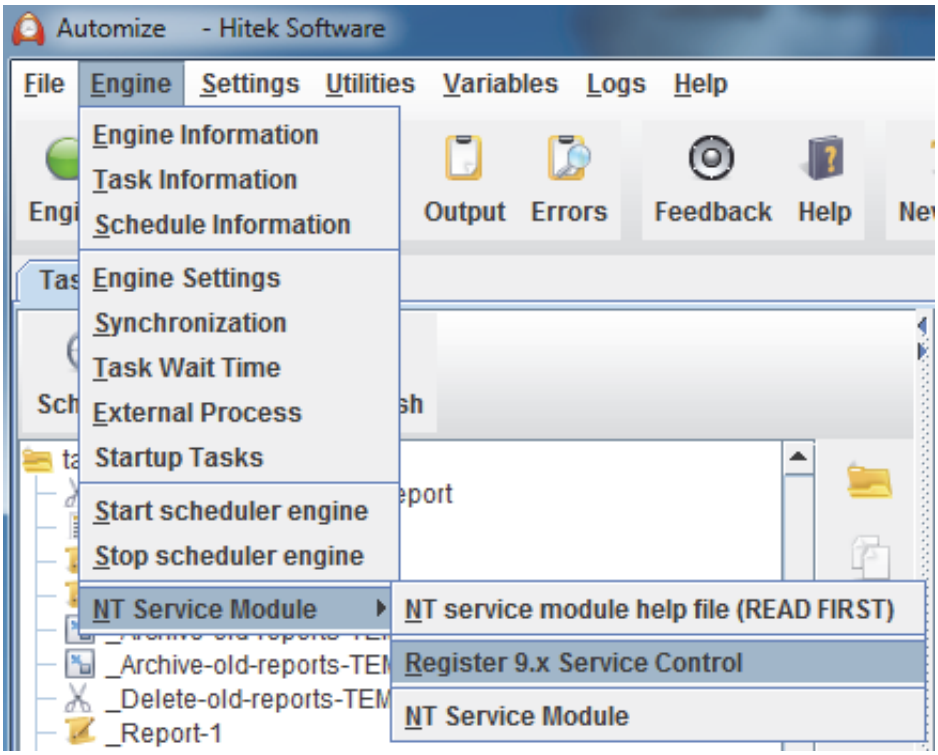


Figure 1-7. Engine menu

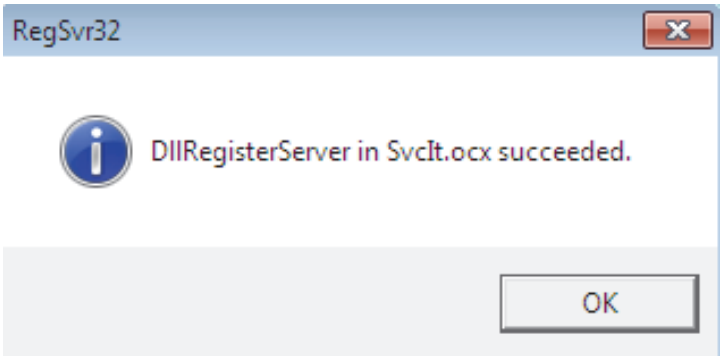


Figure 1-8. Automize9 Register 9.x Service Dialog Box

13. Click **OK.**
14. Click menu **Engine > NT Service Module > NT Service Module.**

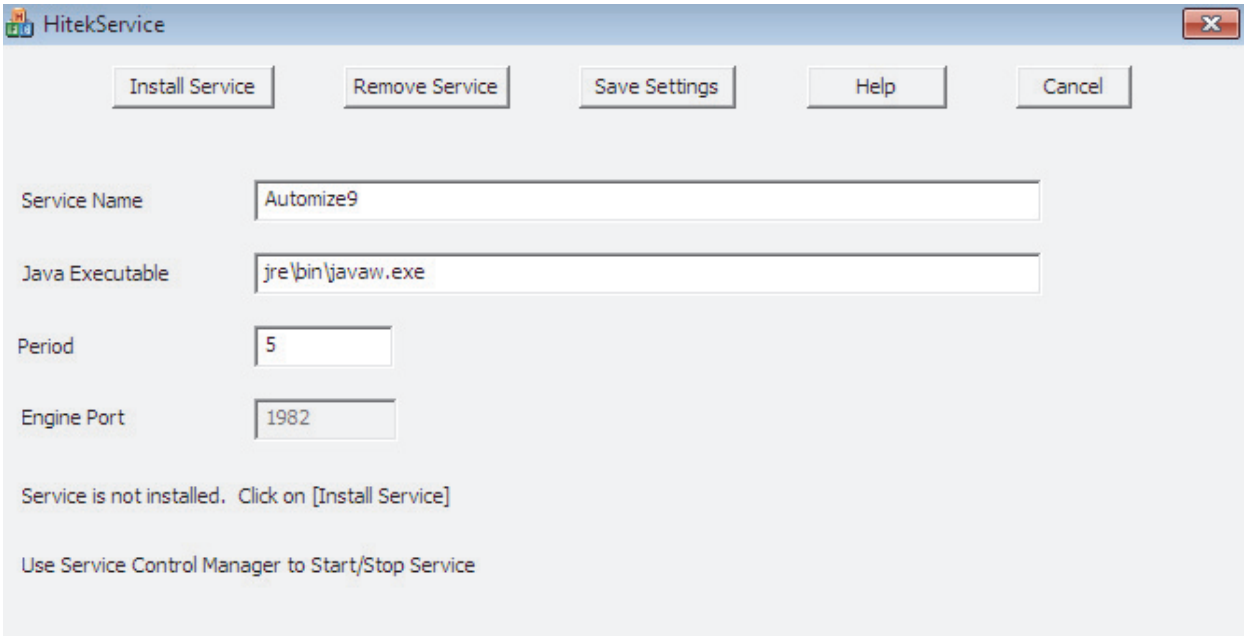


Figure 1-9. Automize9 Service Module Dialog Box

15. Click **Install Service**. This will add the service to the Service Control Manager. Close the current window by clicking the "**Cancel**" button.
16. The Automize service must run under a specific user account, other than the default Local System Account. The chosen account to run the Automize scheduler can be different from the account used to log into the computer. However, the account must have the following attributes:
    - Authorized for access to ODBC Driver for AIM*Historian
    - Administrator privileges
    - The right to log on as a Service
    - [For Excel 2007 and 2010]

      Excel Extension Hardening has to be disabled for the selected user. During the installation of the Report Package this is automatically done for the currently logged-in user account. If another account is chosen Extension Hardening has to be manually disabled.
17. Open the Windows Service Control Manager, via the Control Panel (for Windows XP/2003 select **Start > Settings > Control Panel > Administrative Tools > Services**, for Windows 7 select **Start > Control Panel > System and Security > Administrative Tools > Services**).

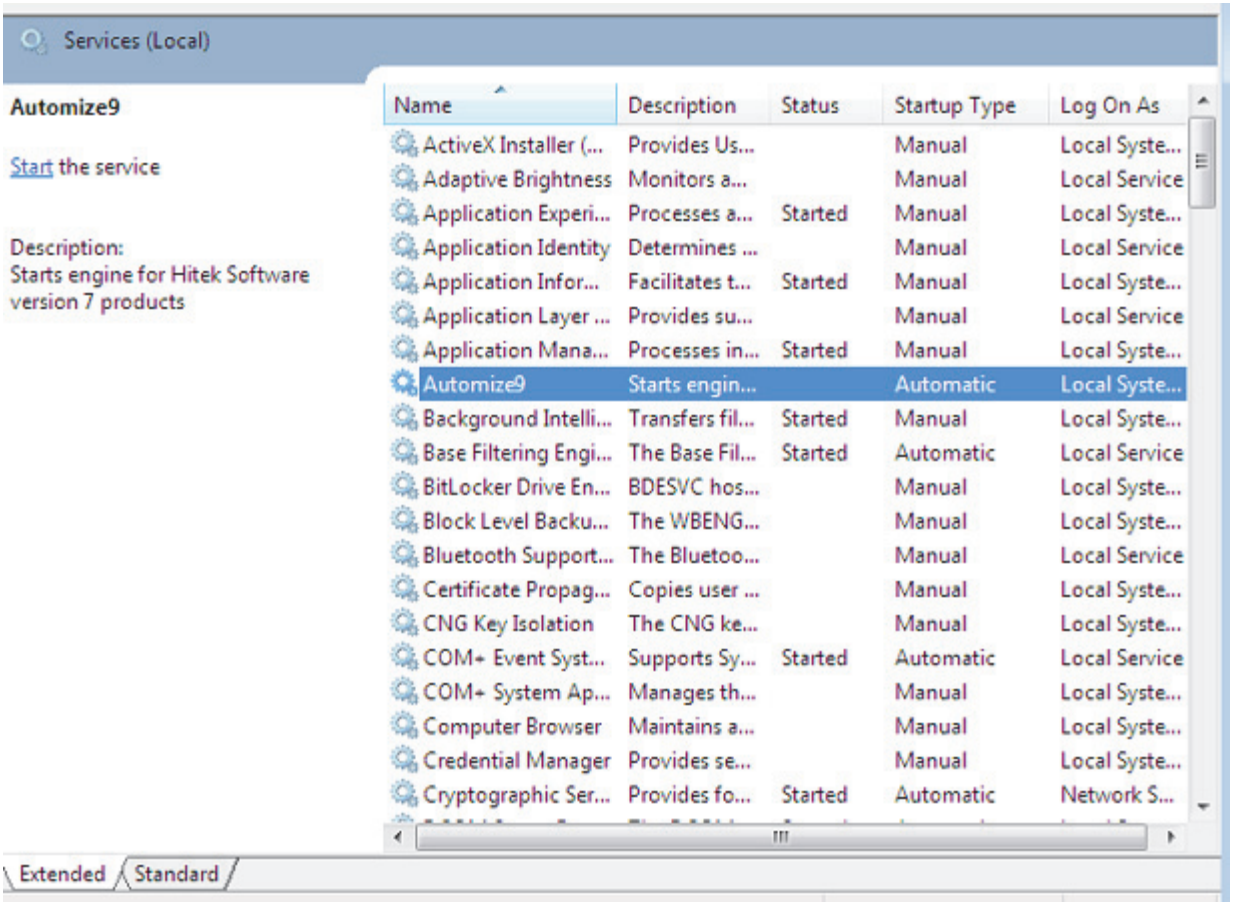


Figure 1-10. Windows Service Control Manager

18. Double click the Automize9 service list item in order to access its properties window.
19. Set the properties for the Service, as shown in the Recommended Settings table below and then click OK to save the settings.

Tab	Field	Value
Log On	Account	Select the "This Account" radio button and type in the user name and password corresponding to the user account previously chosen at step.
Log On	Interact with desktop	Leave the check box unchecked
General	Startup Type	Automatic (default)

20. To start the Automize service, right click the Automize9 entry in the services list and then click Start.

    (This is only necessary for the first time. In the future, the service will start automatically at system reboot.)

Changing the User Account

The report server, that is, the station where the I/A Series Report Package is installed, requires a User Account configured with the following attributes:

- The user must be authorized for access to ODBC Driver for AIM*Historian.
- The user must have Administration Privileges.
- The user must have the right to log on as a Service.

It is suggested that the above User Account be the same as the account used to log on the computer.

If you intend to use two different accounts while simultaneously running On-Demand reports from the standard log-in account, consider the following:

- Excel Macro Protection is account-dependent.
- ODBC Driver for AIM*Historian authorization is account-dependent.
- Standard elements of the Microsoft Windows operating system environments can be account-dependent, for example, printer setup, or e-mail setup.

Running the I/A Series Report Package Setup Program

NOTE

Before installing the I/A Series Report Package on an I/A Series station, disable I/A Series on the station and reboot the machine. After the setup of all components is completed, I/A Series can be re-enabled.

Excel, AIM* ODBC driver and Automize software must be installed prior to installing the I/A Series Report Package.

WARNING

In order for the Report Package setup program to be able to correctly determine the location of your Microsoft Office or Microsoft Excel installation ensure the following:
No Microsoft Office or Microsoft Excel installation folder must be present on the hard-disk. This could be the case if the software has been previously copied to the hard disk in order to install the software.
No Microsoft Office or Microsoft Excel installation media must be present in CD/DVD drives or on other connected external media (like the USB disk).

To load the I/A Series Report Package Setup program:

1. Exit other Windows programs before running the Setup program.
2. Insert the Report Package Install CD-ROM in the CD-ROM drive of your system.
3. Navigate to the root folder of the Report Package Install CD-ROM.
4. Select **Step2_RptPkg_setup.exe** on the CD-ROM drive and click **OK**.

5. The installation program searches the report server for the Microsoft Excel application, the AIM*ODBC driver, and the Automize software. A result dialog appears at the end of the search operation. If any of the applications cannot be found then an error message will be displayed.

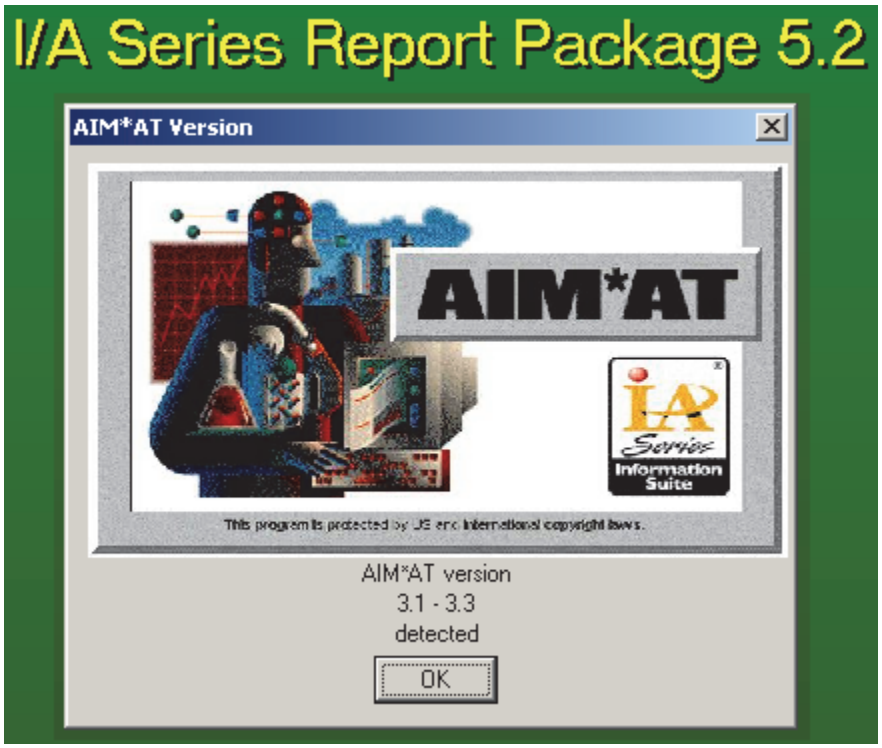


Figure 1-11. AIM*AT Version Detected Window

6. Click **OK**. The I/A Series Report Package Welcome window appears.

\

Figure 1-12. I/A Series Report Package Welcome Window

7. Click **Next**.

Company Name

The **Company's Name** dialog box appears.

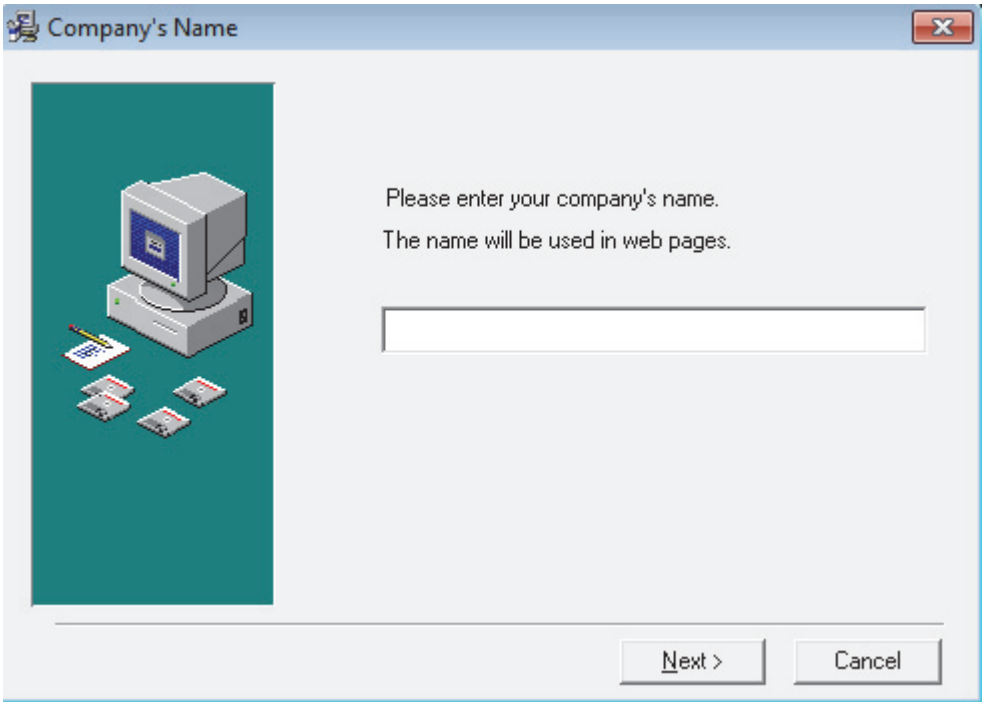


Figure 1-13. Company Name Dialog Box

1. Enter the name of the company to display on reports published on the web.
2. Click **Next**.

   The **Choose Destination Folder** dialog box appears.

Program Directory

The I/A Series Report Package is installed in the directory specified on the Choose Destination Folder dialog box.

- Click **Next** to accept the default destination folder displayed, or click **Browse** to choose another destination folder.

  The default destination is C:\rpt_pkg for non-I/A workstations and D:\rpt_pkg for I/A workstations. However, you can install the I/A Series Report Package in any directory.

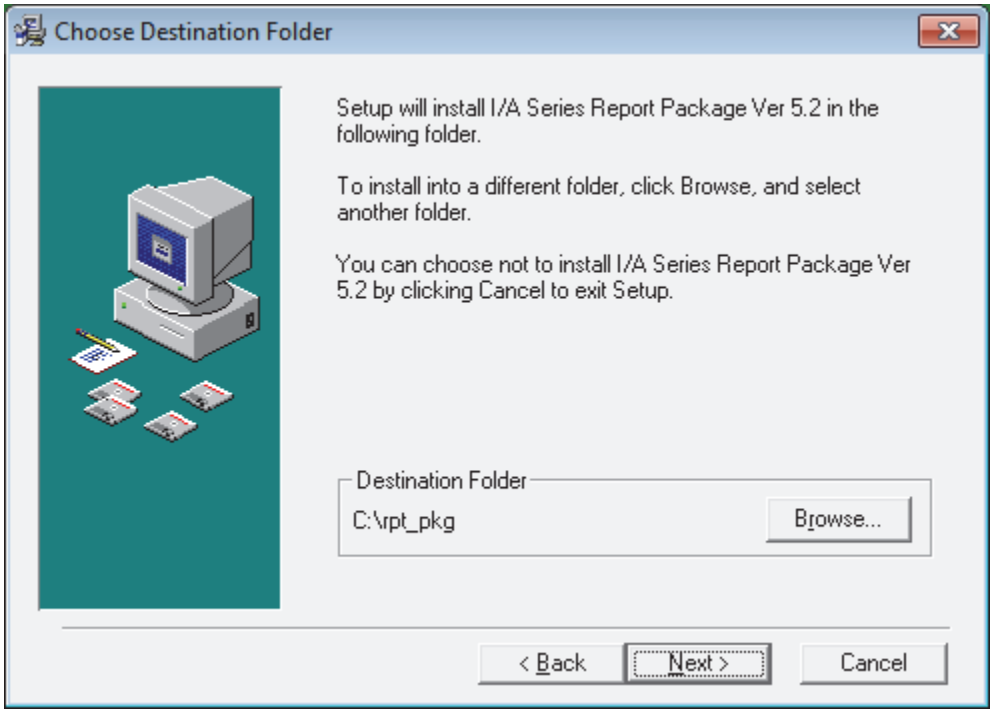


Figure 1-14. Choose Destination Folder Dialog Box

Choose Reports Folder

When you continue with the installation, Setup displays the Choose Reports Folder dialog box (Figure 1-14) for you to specify the folders where HTML reports and Excel reports (Done_Reports) are saved.

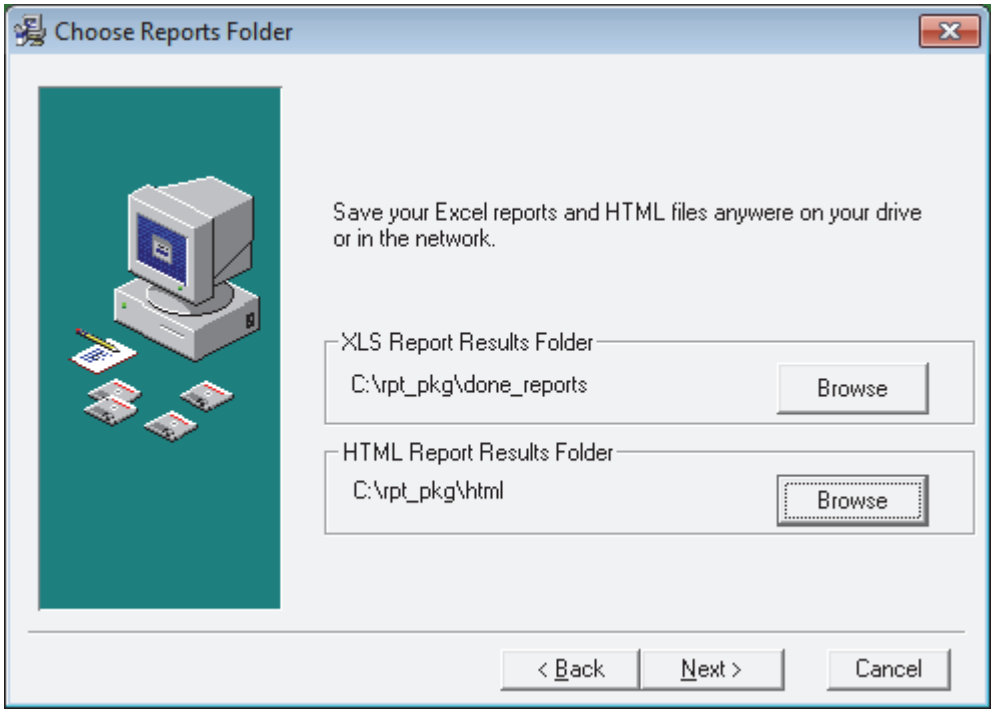


Figure 1-15. Choose Reports Folder Dialog Box

- Click **Next** to accept the default destination folders displayed, or click **Browse** to choose another destination folder.

  You can store HTML and executed reports in any directory, however it is recommended that you keep the folders within the rpt_pkg root directory. If you elect to store HTML reports on a remote directory while at the same time intending to take advantage of the Web Reports Portals, the remote directory has to be shared and mapped using the standard Microsoft Map Network Drive procedure.

Add to the Start Menu

You can add the I/A Series Report Package to your Start menu and an icon to your desktop with the Add to the Start menu dialog box.

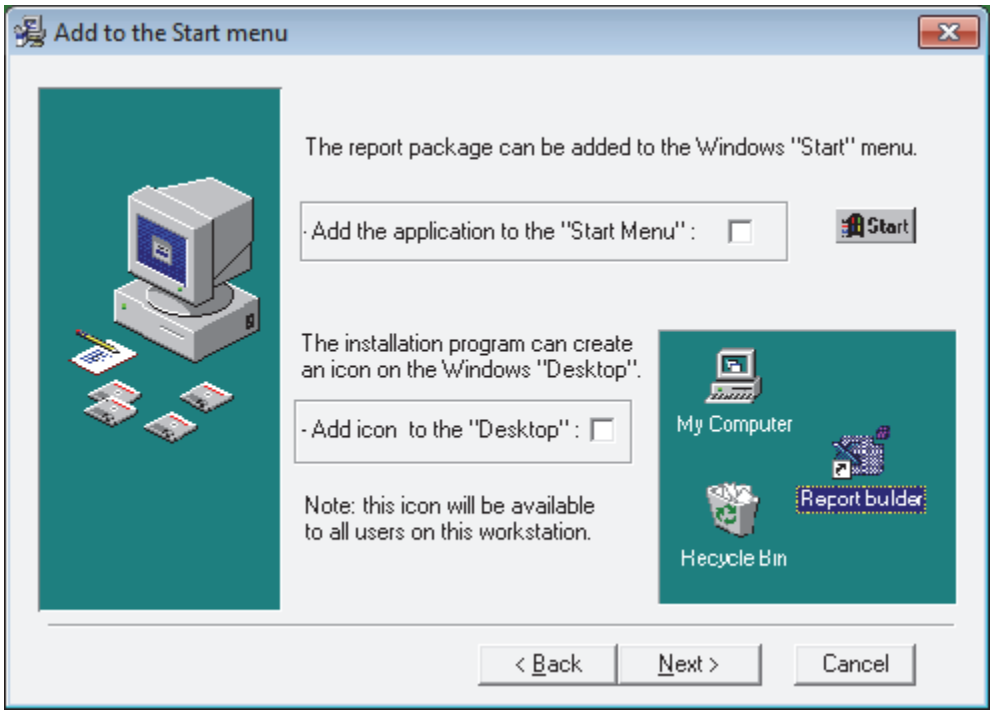


Figure 1-16. Add to the Start Menu Dialog Box

- Click the check box of each desired option, and then click **Next** to continue the installation.

  If you check the Add the application to the Start Menu check box, the Select Group Member dialog box appears.

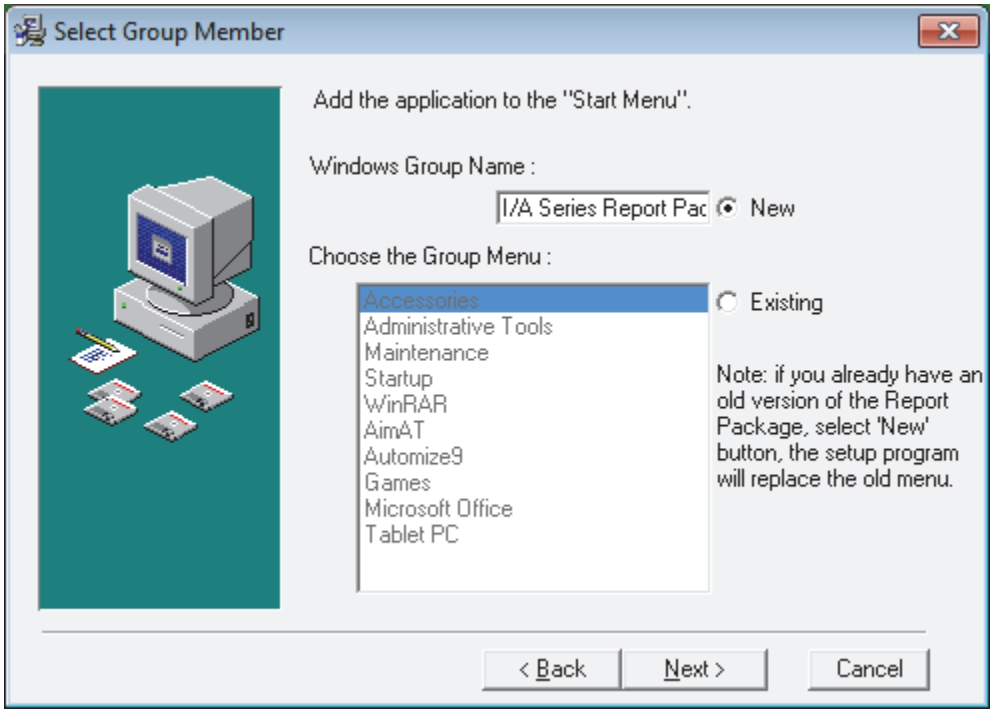


Figure 1-17. Group Membership Dialog Box

- Specify a new or existing group name into which the I/A Series Report Package option will be added and click **Next**.

Start Installation

When Setup has enough information, the **Start Installation** dialog box appears.

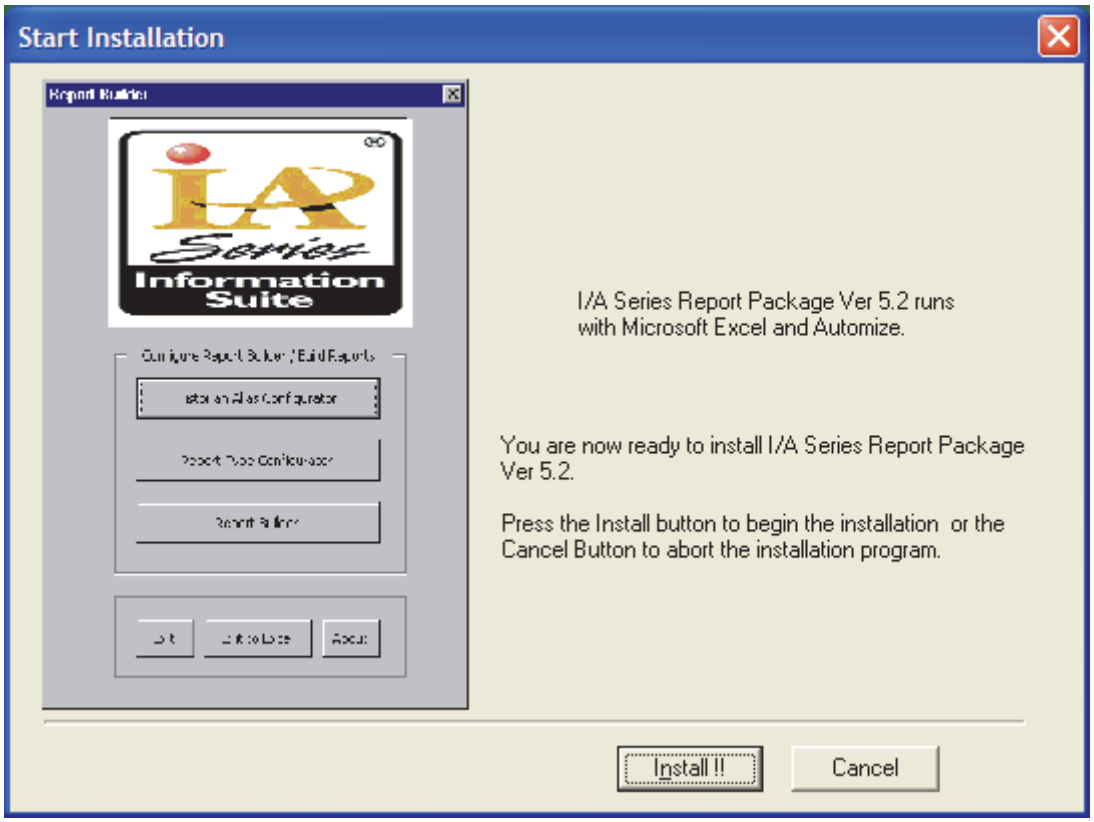


Figure 1-18. Start Installation Dialog Box

- Click **Install**, to begin copying I/A Series Report Package files onto the workstation.

  The Installing dialog box shown in the next figure displays the name of each file and a progress bar as it is installed.

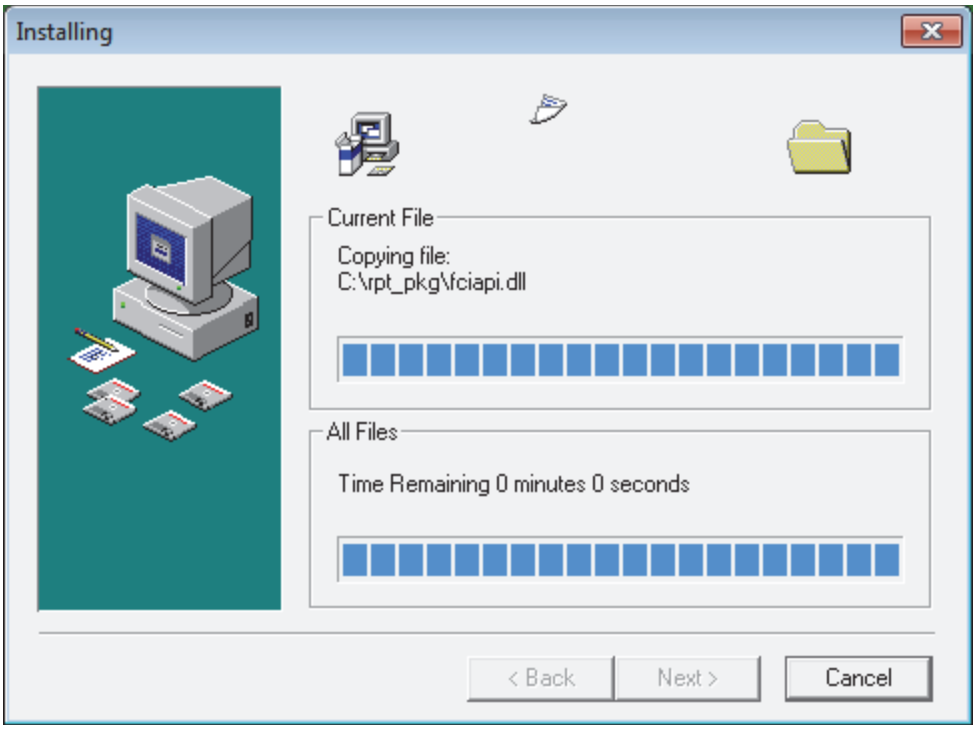


Figure 1-19. Installing Dialog Box

Completing Installation

When all files have been copied, the installation program exits after reminding you that reports that were created with previous versions of the I/A Series Report Package can be updated. Refer to Appendix D "Updating Existing Reports".

NOTE

When finished installing the I/A Series Report Package on an I/A Series station, open the Control Panel > Foxboro I/A and check the Start I/A Series at Reboot option. Then reboot the computer with I/A Series application running.

Authorization of the Report Package and the ODBC Driver for AIM*Historian

Use the AIM*AT API Admin tool to authorize the Report Package (package name IARPKG) and to authorize the ODBC Driver for AIM*Historian (package name AIMODB). Refer to the I*/A Series Information Suite AIM*AT Installation Guide* (B0193YM).

On the Authorization page:

1. Enter the authorization code for AIMODB.
2. Enter the authorization code for IARPKG.

On the User Names page:

1. Add the User Name referenced in the Automize installation section "Choosing a User Account" in “Installing the Automize Scheduler” on page 7.
2. Add the Report Package Computer Name as a User.
   The Report Package Computer Name is as shown under **Control Panel > System**.

On the Packages page:

1. Check the AIM*API and AIMODB for the Automize User.
2. Check the AIM*API and IARPKG for the Computer Name User.

On the Security page:

1. Check all boxes for the Automize User.
2. Check all boxes for the Computer Name Use

2. Configuration

*This chapter explains how to configure AIM*Historian and I/A Series Historian reduction groups and how to define aliases for sample and reduction groups.*

Reports are built using values from an AIM*Historian or I/A Series Historian database. The points used in the report must first be configured in either AIM*Historian or I/A Series Historian. Aliases for them must then be defined in the I/A Series Report Package.

AIM*Historian or I/A Series Historian Reduction Groups

Shift and daily reports require an hourly reduction group configured in either AIM*Historian or I/A Series Historian. Weekly and monthly reports require a daily reduction group.

Once the reduction groups are created, define aliases for them using the I/A Series Report Package. For more information, refer to the *I/A Series Information Suite AIM*Historian User's Guide* (B0193YL).

Hourly Reduction Group

Configure the points used in shift and daily reports in hourly reduction groups. Configure the hourly reduction group as follows:

3. Set the Reduction period (Frequency) to 1 Hour.
4. Set the Operation Name to be the reduction group name followed by the operation name, for example, _max.

Daily Reduction Group

Configure the points used in weekly and monthly reports in daily reduction groups. Configure the daily reduction group as follows:

1. Set the Reduction period (Frequency) to 1 Day.
2. Set the Operation Name to be the reduction group name followed by the operation name, for example, _max.

Configuring Sample and Reduction Group Aliases

Use the I/A Series Report Package Alias Configurator to define aliases for the AIM*Historian or I/A Series Historian sample and reduction groups.

1. Open the **rpt_builder.xla** file or click the **Report Builder** desktop icon to run the Report Builder.

   The **Main menu** is displayed.

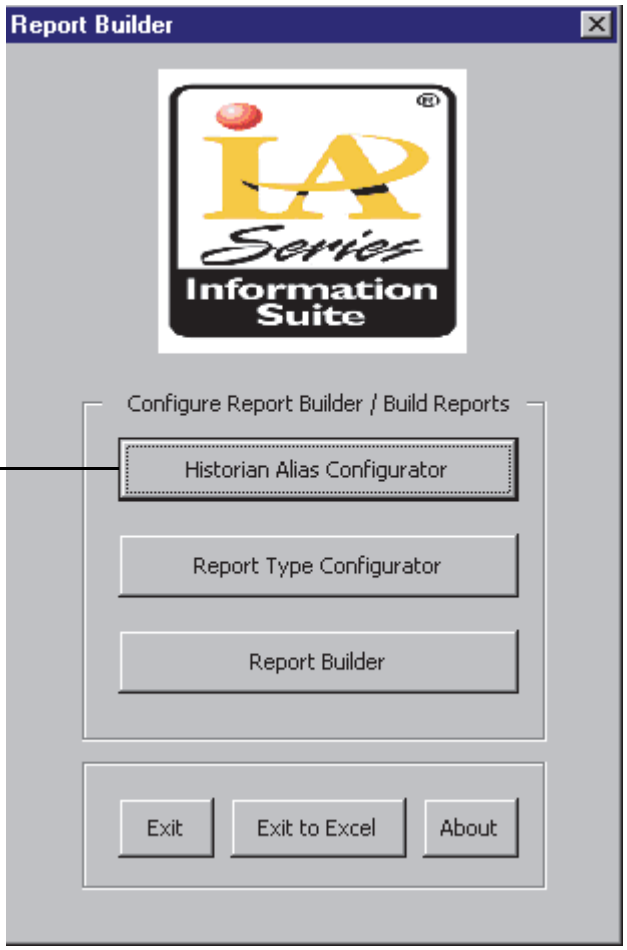


Figure 2-1. Report Builder Main Menu

2. Click the **Historian Alias Configurator** button.

   The Alias Configurator window is displayed. The Aliases area of the window lists the settings for current aliases.

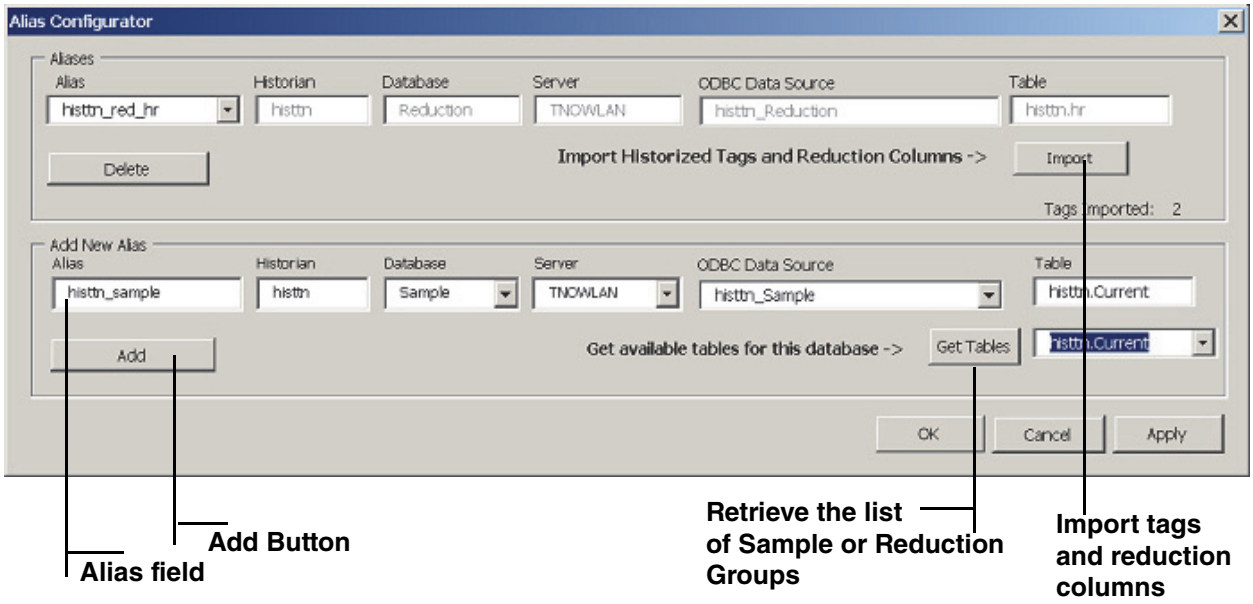


Figure 2-2. Alias Configurator

Create the new alias for an AIM*Historian or I/A Series Historian sample or reduction group by entering the following data in the Add New Alias fields:

3. In the Alias field, enter the name of the Alias to create.
4. In the Historian field, enter the name of the Historian database.
5. In the Database pull-down list box, enter or select **Sample** or **Reduction**.
6. In the Server pull-down list box, enter or select the Server name.
7. In the ODBC Data Source pull-down list box, enter or select the Data Source.
8. For creating ODBC data sources, refer to “Creating ODBC Data Sources” on page 4.
9. Click **Get Tables**, and then select a table from the pull-down list box.
10. Click **Add** to create the Alias.

TIP

The Import button can be used to import historized tags and reduction columns into an existing alias. This is done after an expansion or a modification of the Historian.

Delete an Alias

To delete an Alias:

- Select an Alias from the Alias pull-down list box and click **Delete**.

The configuration of the Aliases remains unchanged until it is saved. Exiting the Alias Configurator without saving discards any changes made.

3. Building Reports

This chapter explains how to configure and build reports locally and from a remote workstation.

Configuring New Report Types

The I/A Series Report Package contains four pre-defined report types templates. Table 3-1 lists the default start and duration times for each report type.

Table 3-1. Pre-Defined Report Configuration

Report Type (.xlt)	Start	Duration
Shift	Time: 0:00	8 Hours
Daily	Time: 0:00	24 Hours
Weekly	Day: Sunday	7 days
Monthly	Day: 1	1 month

Starting from the pre-defined report types and using the Report Type Configurator, you can create new report types and subsequently format them with Excel.

To create a new report type:

1. Start the I/A Series Report Package.

   The Main menu appears.

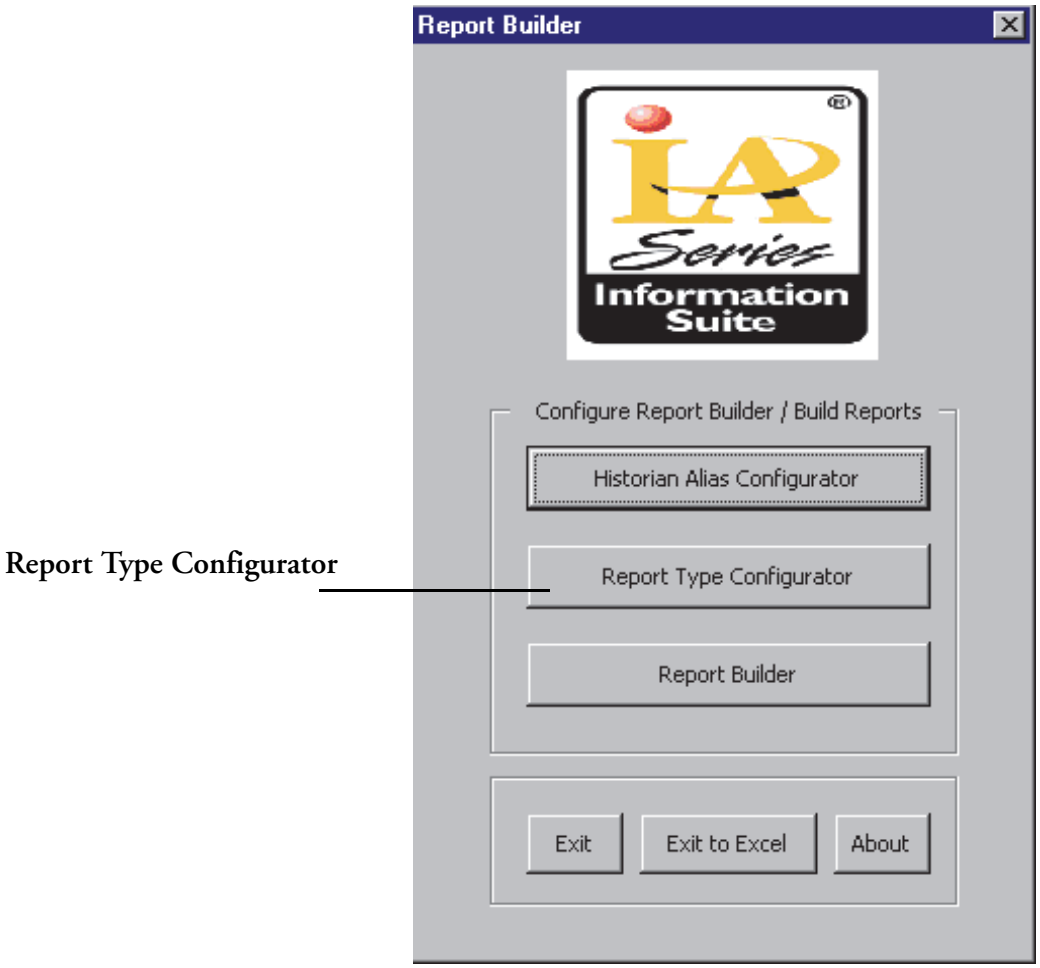


Figure 3-1. Report Builder Main Menu

2. Click the **Report Type Configurator** button.
   The Report Type dialog box appears.

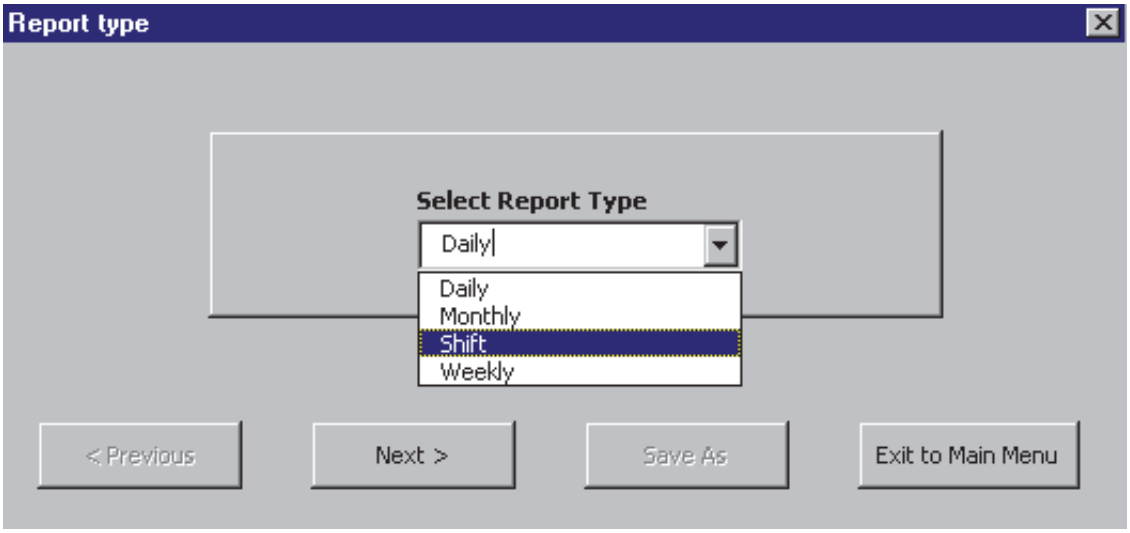


Figure 3-2. Report Type Dialog Box

3. Select a report type from the Select Report Type pull-down list box and click **Next**.

   The Timing for Shift Report dialog box displays to set the start time and duration of the new report type.

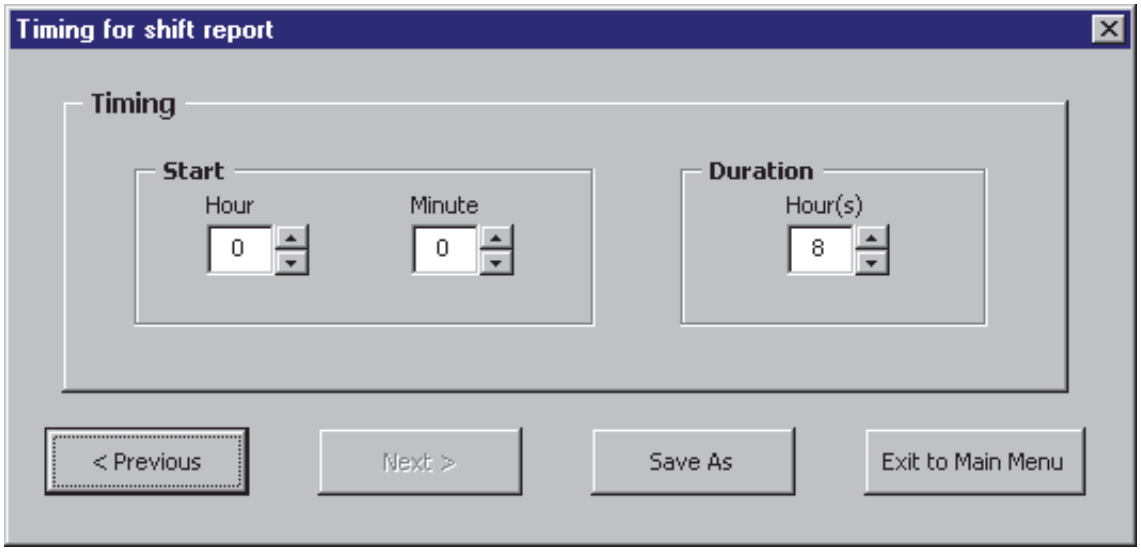


Figure 3-3. Timing for Shift Report Dialog Box

4. Specify the start time in the Hour field.
5. Specify the duration in the Hour(s) field.
6. Click **Save As**.
7. Enter a unique name and specify the location to store the new report type. Report templates are saved with a default .xlt extension.
8. Select **Save**.

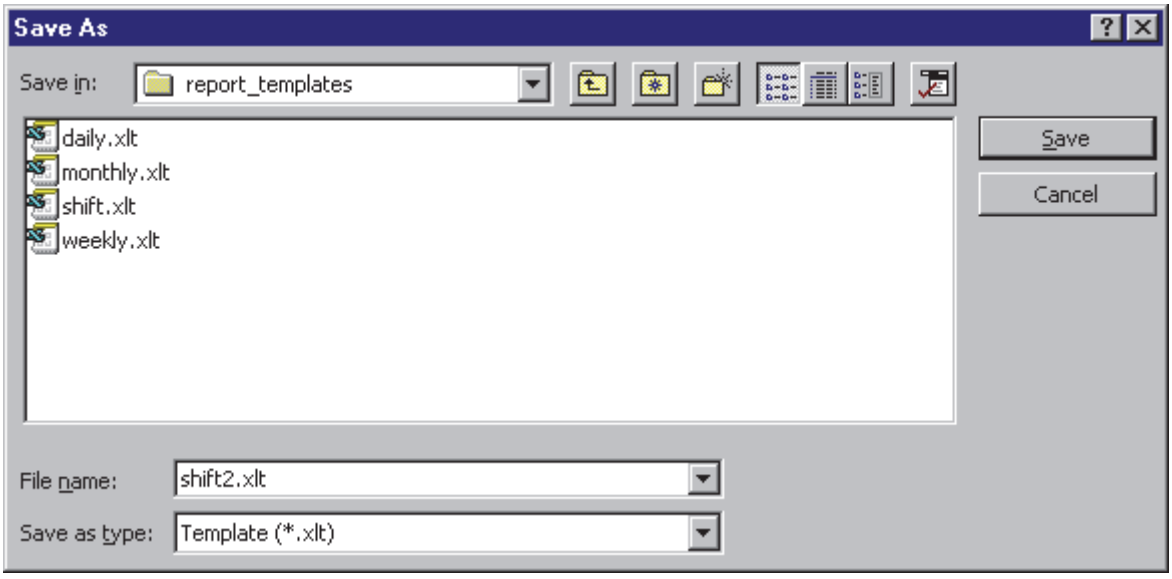


Figure 3-4. Report Template Directory

9. When the new report type is created, modify the format using Excel.

To create a new report template for a 12 hour shift report:

1. Open the Shift report template in Excel.
2. Since the Shift report is configured to have duration of eight hours, copy and paste four rows to the existing template.
3. Save the new report template with a unique name in the report_templates directory. The new report type is now available for building reports.

Building Reports

The Report Builder Wizard is used to create a new report or to modify an existing report. With the wizard you can define, add and remove AIM*Historian or I/A Series Historian tags from the Excel worksheet.

To build a report:

1. Click **Report Builder** on the Report Builder Main Menu (Figure 3-1).

   The **Build or Modify** dialog box appears

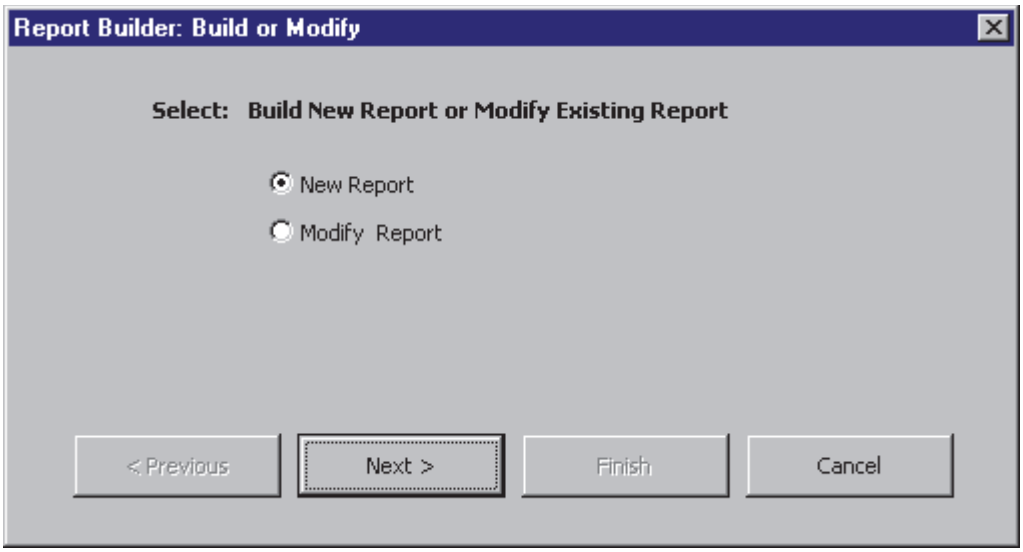


Figure 3-5. Build or Modify Dialog Box

2. Click either:
   - **New Report** to create a new report, or
   - **Modify Report** to edit the format of an existing report. The **Report Type** dialog box is displayed.

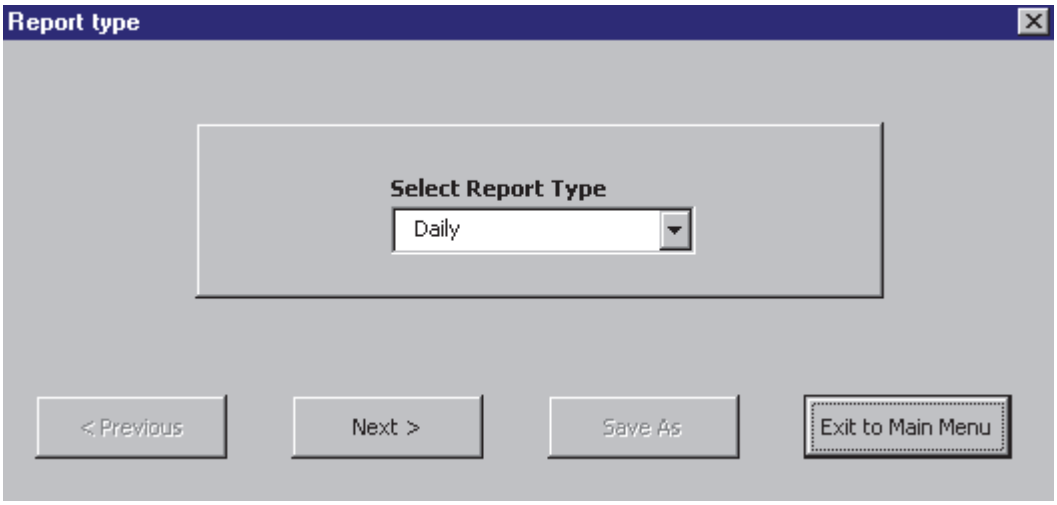


Figure 3-6. Report Type Dialog Box

3. Select a report type from the default list and click **Next**.
   The Report Name dialog box is displayed (Figure 3-7).
4. Enter a name for the report in the Report Name field.

NOTE

The report name must not contain any spaces (there will be an error message in that case). Also, dashes (-) should be avoided since this prevents user macros from being executed.

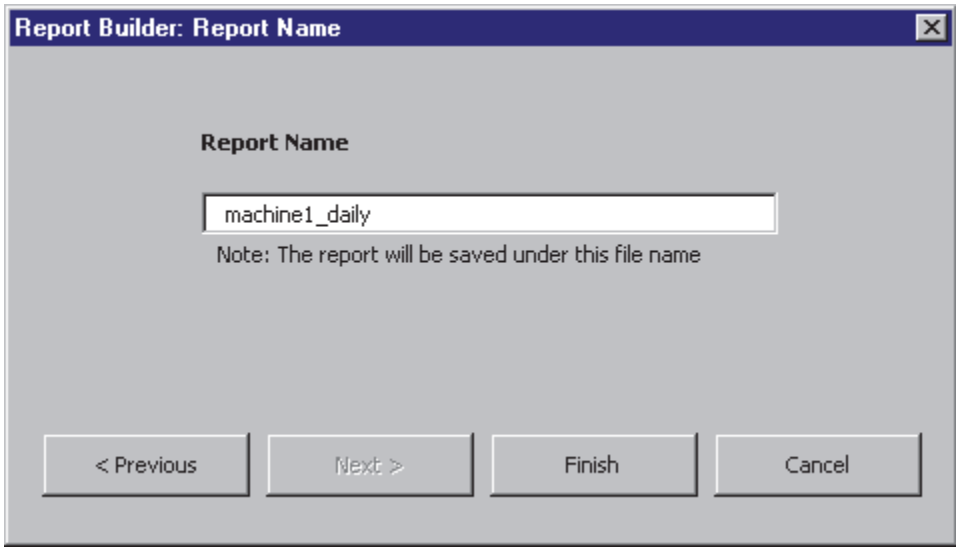


Figure 3-7. Report Name Dialog Box

5. Click **Finish** to start building the report.

The **Report Builder Cell Editor** Dialog box displays. An Excel template for the selected report type is automatically loaded and ready to be configured.

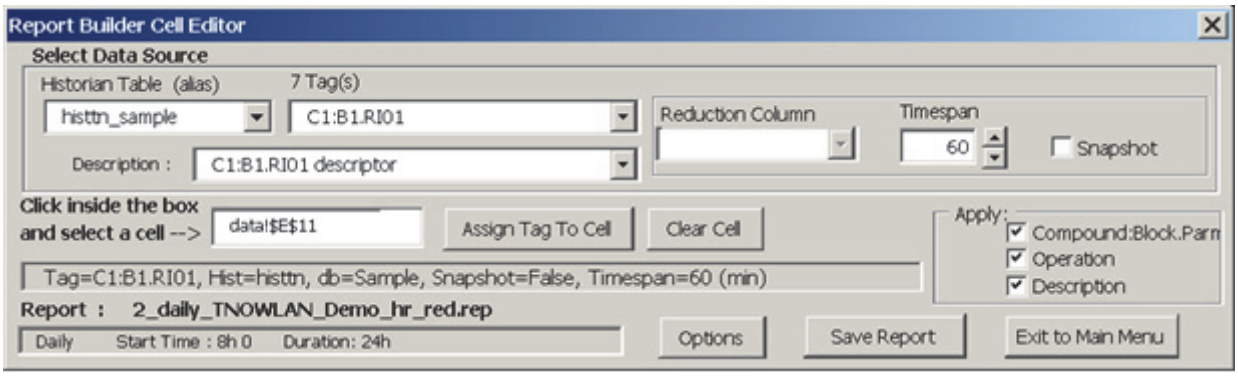


Figure 3-8. Report Builder Cell Editor Dialog Box

Adding a Report Tag

Use the Cell Editor to add a new AIM*Historian or I/A Series Historian tag to the worksheet:

1. Select a tag displayed in the Tag(s) or Description list boxes.
2. Click inside the text box labeled **Click inside the box and select a cell**.

   The worksheet behind the Report Builder Cell Editor is enabled.
3. Select a cell on the worksheet for which the tag is to be assigned.
4. Click **Assign Tag To Cell**.

   The tag displays on the worksheet cell.

When the report is run, the worksheet is populated with the sample or reduction group data. Historical data is inserted in the worksheet starting from the row where the tag was inserted.

Compound:Block.Parameter Settings

- Select the **Compound Block Param** check box to automatically insert the
- Compound:Block.Parameter five cells above the selected cell.
- Select the **Operation** check box to insert the Operation Name three cells above the selected cell.
- Select the **Description** check box to automatically insert the Tag Description two cells above the selected cell.

TIP

The Compound:Block.Parameter is always inserted in the selected cell regardless of the Apply check box settings.

Removing a Report Tag

Use the Report Builder Cell Editor to remove a tag from a worksheet:

1. Click inside the text box labeled **Click inside the box and select a cell** prior to selecting a worksheet cell from which to remove a tag.
2. Select the cell on the worksheet from which the tag is to be removed.
3. Click **Clear Cell**.

The Compound:Block.Parameter is cleared from the selected cell and the link to the Historian is removed.

NOTE

Using Excel to clear the C:B.P cell does not remove the link to the Historian.

Saving the Report

When the configuration of the report is completed, save the report.

1. Click **Save Report** to save the new report configuration.
2. Click **Exit to Main Menu** to exit the editor.

Sample Database Controls

You can configure the cells that retrieve data from the AIM*Historian or I/A Series Historian sample database. When an alias referring to the sample database is selected, the Cell Editor's Sample Database controls, Timespan and Snapshot, are activated (Figure 3-9).

- Checking the **Snapshot** check box ensures that only a single value is reported for the tag.
  - For aliases using a linearized DSN the report will contain the last good value for the reporting period with a timestamp equal to the end time of the report.
  - For aliases using a non-linearized DSN the report will contain the last collected value (good or bad) and a timestamp equal to the actual collection time.
- Un-checking the **Snapshot** check box ensures that a series of sample values are reported for the duration in minutes specified in the **Timespan** field.

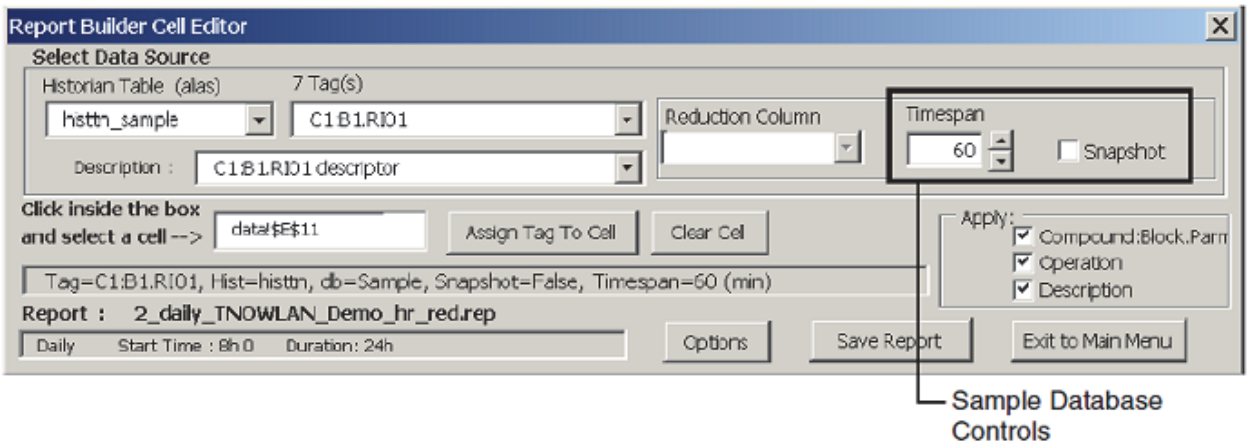


Figure 3-9. Sample Database Controls

Reduction Database Controls

You can configure the cells that receive data from the AIM*Historian or I/A Series Historian reduction database. When an alias referring to the reduction database is selected, the controls Reduction Column and Max Rows are activated.

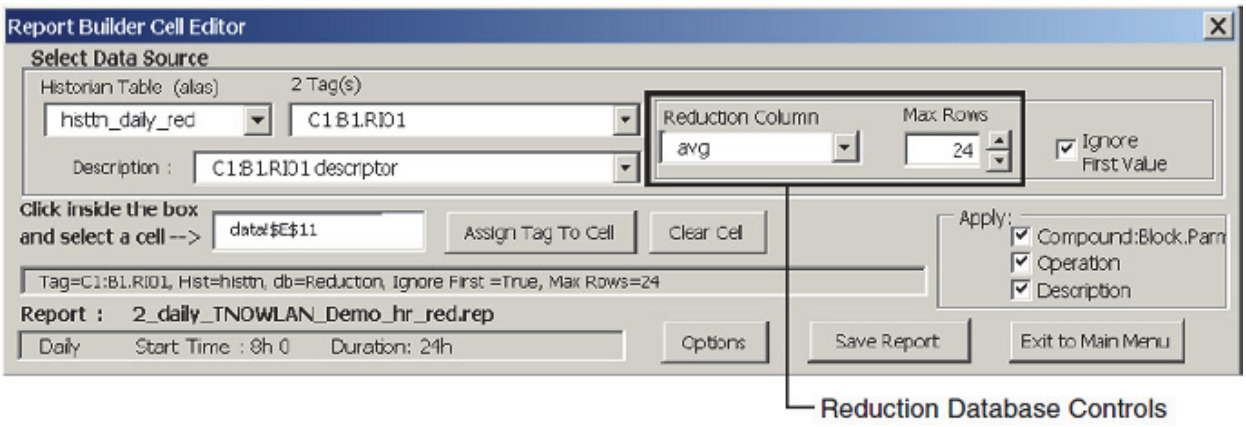


Figure 3-10. Reduction Database Controls

To configure the cells that receive data from the AIM*Historian or I/A Series Historian reduction database:

1. From the Reduction Column pull-down list box, select the type of Reduction operation to be performed.
2. Specify the maximum number of rows of data in the Max Rows control.
3. Click the **Ignore First Value** check box to specify that data reduction retrieval exclude the value at the start of the query interval.

   This is usually desirable, since that reduction would be based on samples that predate the report period.

Timestamps of Reduction Data: Concept and Application

In the I/A Series Historian and AIM*Historian, the timestamp of reduced data is the end-time of the reduction period.

As shown in Figure 3-11, an hourly average time-stamped 8:00 A.M. represents the average of the samples taken between 7:00 A.M. and 8:00 A.M.

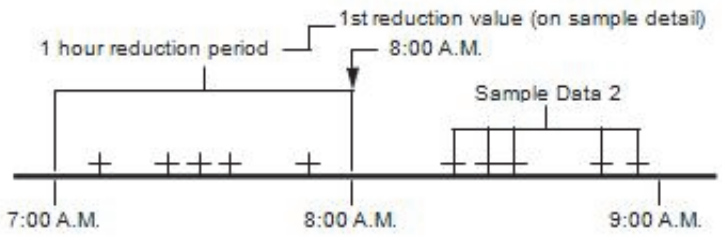


Figure 3-11. Timestamp Example

Another example is that a daily average time-stamped Feb.5, 7:00 A.M. represents the average of the samples taken between Feb.4, 7:00 A.M. and Feb.5, 7:00 A.M.

If desired, you can use Microsoft Excel techniques to explicitly move the reduction timestamp from the reduction period endtime to the reduction period start time. Refer to Appendix B "Report Examples".

A query of reduction data returns values for both ends of the query interval. Hence the first reduction value on a report is based on sample data that precedes the report start time. An example of this is a report that has a start time of 8:00 A.M. and includes the average of the samples taken between 7:00 A.M. and 8:00 A.M. To avoid this effect, select Ignore First Value in the Report Builder Cell Editor. Refer to Appendix B "Report Examples" for more information.

Configuring Report Options

Each report has a set of configurable options for printer selection, e-mail, and HTML which can be changed using the Options Configurator.

Perform the following procedure to configure the options:

1. Click **Options** (Figure 3-12) from the Cell Editor to display the Options Configurator (Figure 3-13).

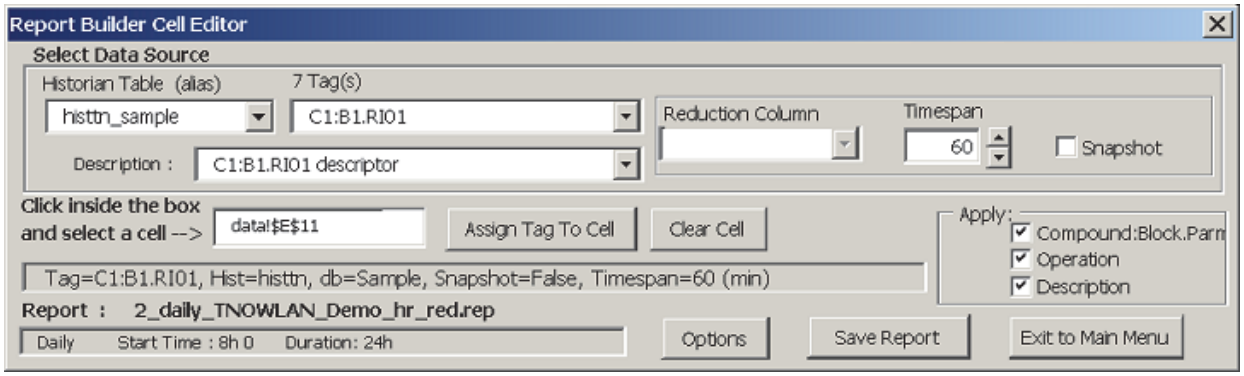


Figure 3-12. Report Builder Cell Editor Options Button

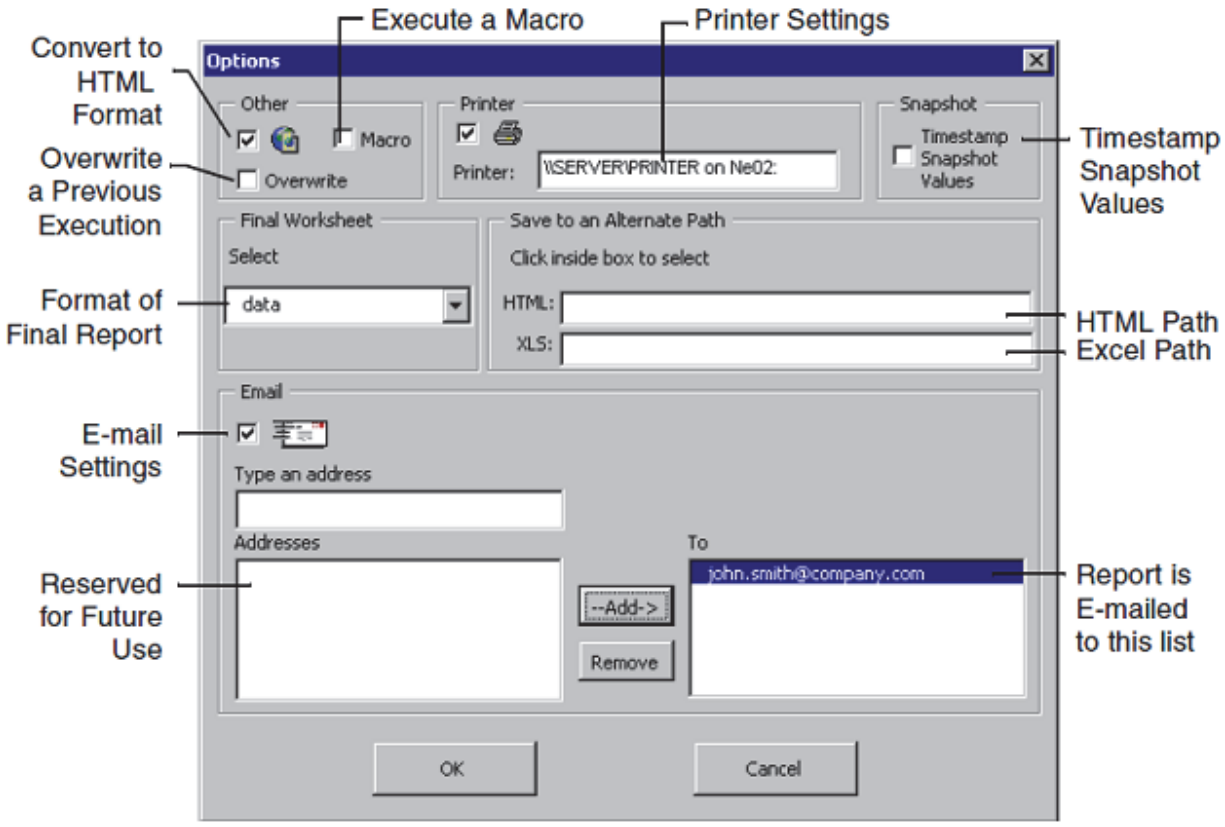


Figure 3-13. Options Configurator

2. Click the check box next to the HTML graphic icon in the upper left corner to convert the report to HTML format.

   If a print area has been defined on the Final Worksheet, this area is used for the HTML conversion.

3. Click the **Macro** check box to enable execution of your own macro.

   Refer to “Macro Option” on page 38" for more information.

4. Click the check box next to the printer graphic icon to print the report. Enter the printer name in the Printer field or double-click inside the Printer field and choose the printer name from the names of the configured printers (Figure 3-14). If accessing the Report Builder from a remote PC, make sure that the printer is also configured on the report server.

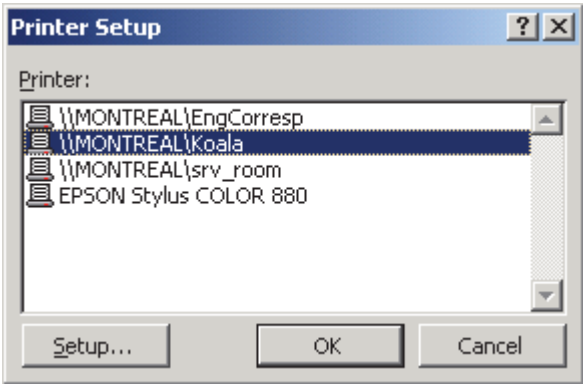


Figure 3-14. Printers Selection Form

Press on the Setup button to change the printing parameters. The form that is displayed is specific to the type of printer. Those parameters are saved within the *.rep file and are used when the report is printed.

5. Click the **Timestamp Snapshot Values** check box to include the time stamp of a snapshot value.

NOTE

The time stamp only applies to the Snapshot type cells. Sample data is time stamped regardless of the time stamp option selected.

6. Click the **Overwrite** check box to maintain the name of the done_report.

   The done_report is the executed report saved to a file.
7. Select the final sheet of the report from the Final Worksheet pull-down list box.

   The final sheet is used for the print of the report and HTML conversion.
8. Enter the directory to which HTML reports will be saved.
9. Double-click inside the HTML field and navigate to the desired directory path.

   If the field is left blank, the report is saved in the default HTML directory which was specified during the installation of the I/A Series Report Package.
10. Enter the directory to which XLS reports will be saved.
11. Double-click inside the XLS field and navigate to the desired directory path.

    If the field is left blank, the report is saved in the default XLS directory specified during the installation of the I/A Series Report Package.
12. Click in the check box next to the E-mail graphic icon to enable the report to be e-mailed when the report is run.

Macro Option

Macro codes can be executed when the report is run. Macros are enabled by clicking the Macro check box on the Options menu ("Configuring Report Options" on page 39).

To add Macro code to a report:

1. Start Excel, open the report .rep file and open the Visual Basic Macro Editor.
2. Select **Module1** and look for the comment "INSERT YOUR CODE HERE".
3. Insert your VB code.
4. Click **Save** and then **Exit**.

   Refer to “User Macro Code Template” on page 77 for more information.

File and Worksheet Concepts

The Report Builder creates a Report Definition File for every configured report. A Report Definition File carries the .rep extension and resides under one of the following folders:

- \rpt_pkg\reports\daily
- \rpt_pkg\reports\monthly
- \rpt_pkg\reports\shift
- \rpt_pkg\reports\weekly.

The Report Builder creates the .rep file with two worksheets:

- The config sheet, hidden by default, contains the part of the configuration that is not cell-specific.
- The data sheet contains cell-specific configuration information.

When the report is executed, the report results are saved in an .xls file. Although this .xls file has the same structure as the .rep file, the data sheet contains the actual retrieved historical data. The report results resides under one of the following folders:

- \rpt_pkg\done_reports\daily
- \rpt_pkg\done_reports\monthly
- \rpt_pkg\done_reports\shift
- \rpt_pkg\done_reports\weekly.

Building a Final Worksheet

Using standard Excel functionality, you can open the .rep file, insert one or more additional worksheets, and then link specific cells of the additional worksheet to specific cells of the data sheet. This allows you to customize the data presentation, customize the timestamp presentation, and make specific data calculations.

When the Report is executed, the Report Results are saved in the .xls file which has the same structure as the .rep file, and includes all of the additional worksheets. As explained in “Configuring Report Options” on page 35, you can select the specific worksheet (Final work sheet) to use for the printout of the report as well as for the HTML conversion.

NOTE

Using Excel, perform a "Set Print Area" on the Final Worksheet. If you forget to perform this "Set Print Area", the html conversion of the final worksheet on some versions of Excel will come out blank. The Report Builder does not interfere with the additional worksheets created by the user. Refer to “Report Examples” on page 71.

Building Reports from a Remote PC

A Remote PC (also referred to as a remote station) can be used to build reports.

Remote PC System Requirements

The remote PC has the same system requirements as stated in “System Requirements” on page 1.

Remote PC Functionality and Limitations

The remote PC has the following functionality and limitations:

- Reports can be built from the Remote PC
- Aliases cannot be created from the Remote PC
- On-Demand report executions cannot be requested from the Remote PC
- Reports cannot be scheduled from the Remote PC
- Special Demand report execution requests are possible from the Remote PC.

As explained in “Executing Reports” on page 47, a Special Demand execution is requested by building a Request text file (also known as the Special Demand Information File) and depositing this text file in the reps_to_run directory.

To access the Report Builder from a remote station, the report server must first be configured to communicate with the remote station. The report server is the station where the I/A Series Report Package is installed.

Configuring the Report Server for Remote Communication

To configure the report server running Windows XP/2003 for remote communication:

1. Right-click on the I/A Series Report Package directory and choose Properties.

   The rpt_pkg Properties dialog box appears (Figure 3-15).

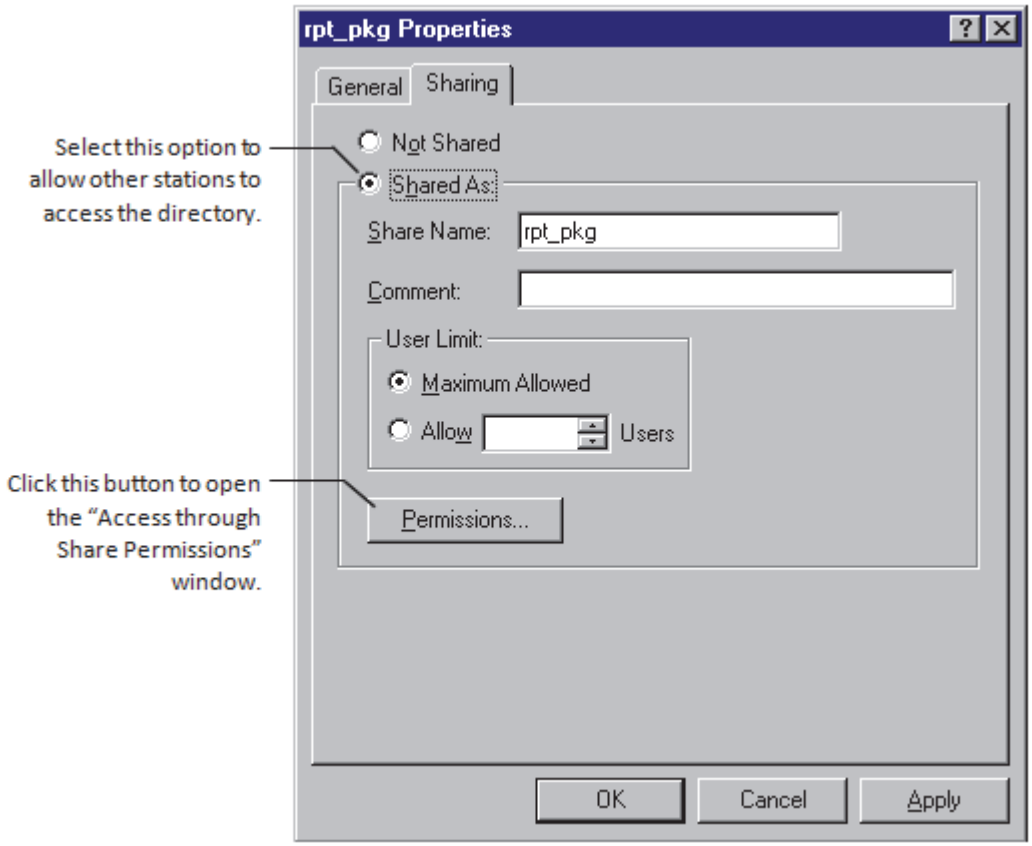


Figure 3-15. rpt_pkg Properties Dialog Box [Windows XP/2003]

2. Select the **Sharing** tab.
3. Click the **Share As** option button to allow a remote station access to the I/A Series Report Package directory.
4. Click **Permission.** The Access Through Share Permissions dialog box appears

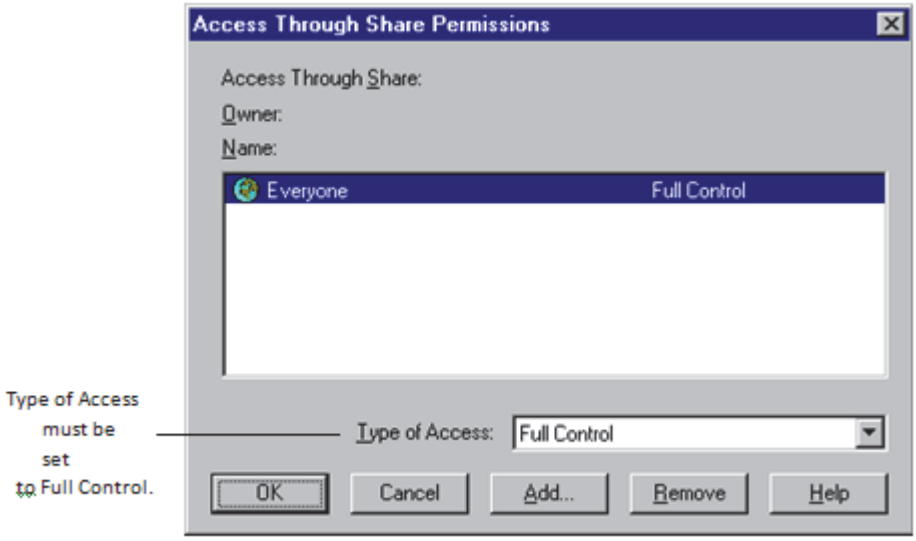


Figure 3-16. Access Through Share Permissions Dialog Box [Windows XP/2003]

5. Select **Full Control** from the Type of Access pull-down list box.

To configure the report server running Windows 7 for remote communication:

1. Right-click on the I/A Series Report Package directory and choose **Properties**. The rpt_pkg Properties dialog box appears (Figure 3-17).

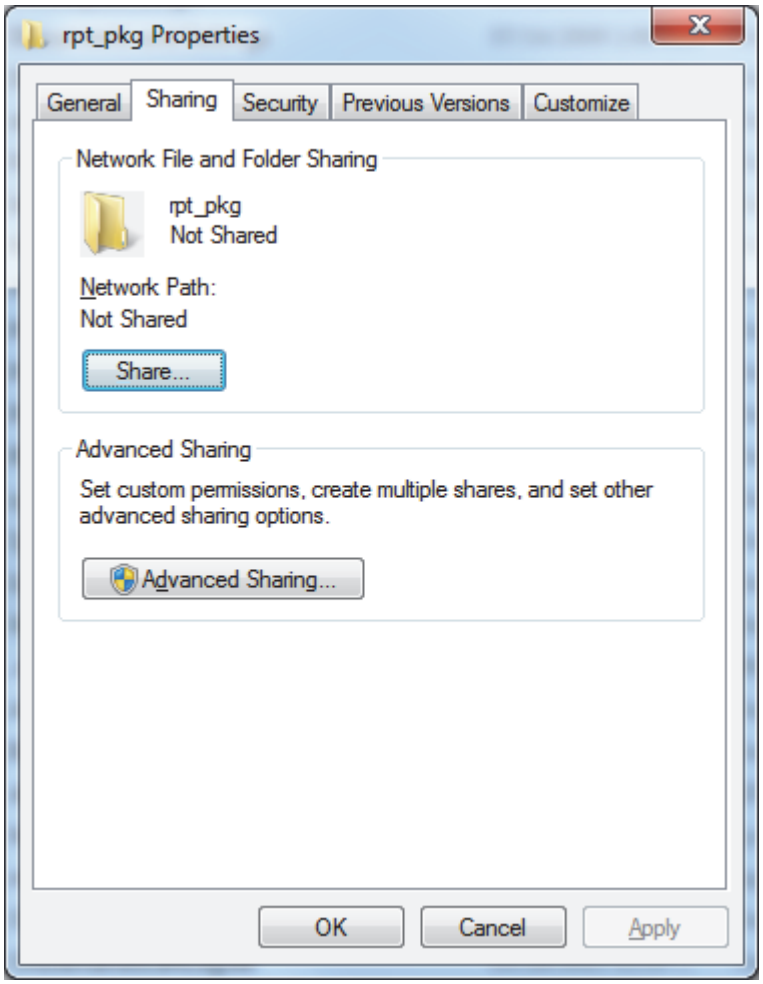


Figure 3-17. rpt_pkg Properties Dialog Box [Windows 7]

2. Select the **Sharing** tab.
3. Click the **Advanced Sharing** button.

   The Advanced Sharing dialog box appears (Figure 3-18).

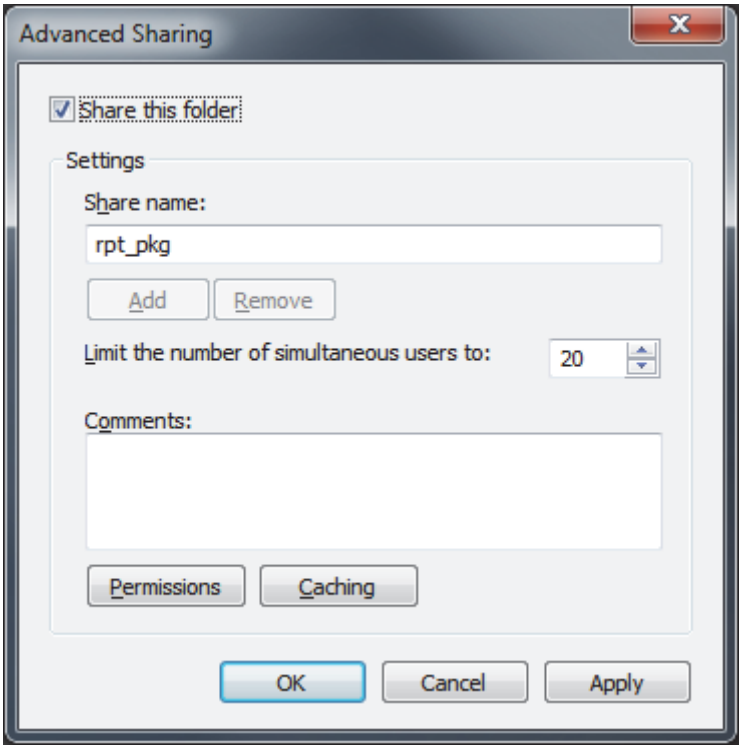


Figure 3-18. Advanced Sharing Dialog Box [Windows 7]

4. Check the check box **Share this folder** and click **Permissions**.
5. The **Permission dialog box** appears (Figure 3-19).

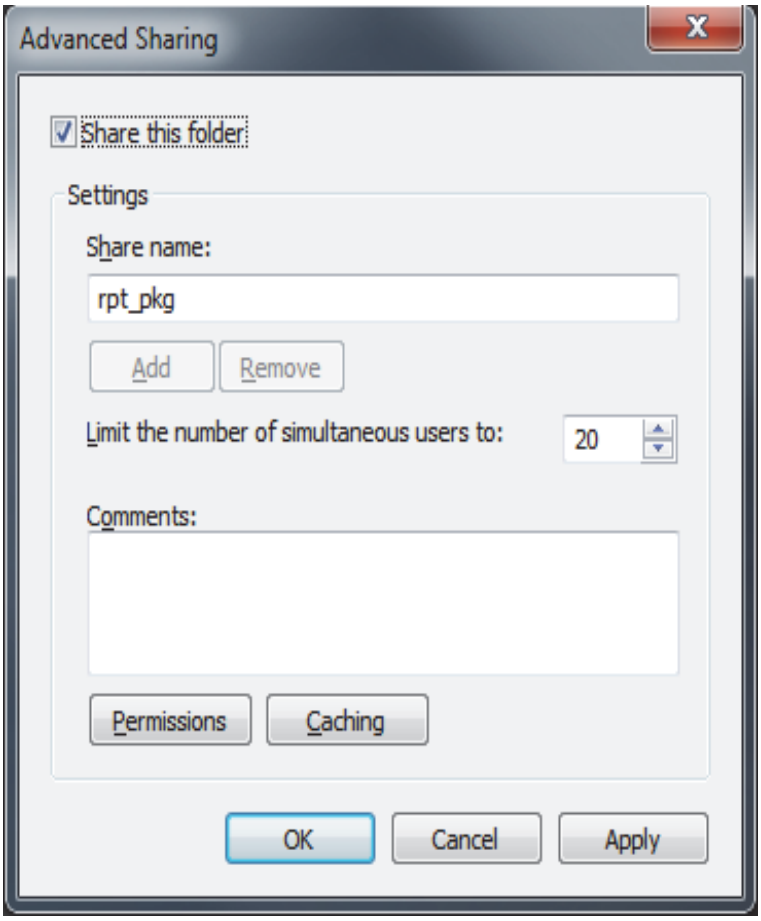


Figure 3-19. Advanced Sharing Dialog Box [Windows 7]

6. Check the Full Control check box in the Allow column and click OK until all dialog boxes are closed.

To create a link to the I/A Series Report Package directory on the remote station:

1. Choose **Tools > Map Network Drive** from Windows Explorer. The **Map Network Drive** dialog box is displayed.

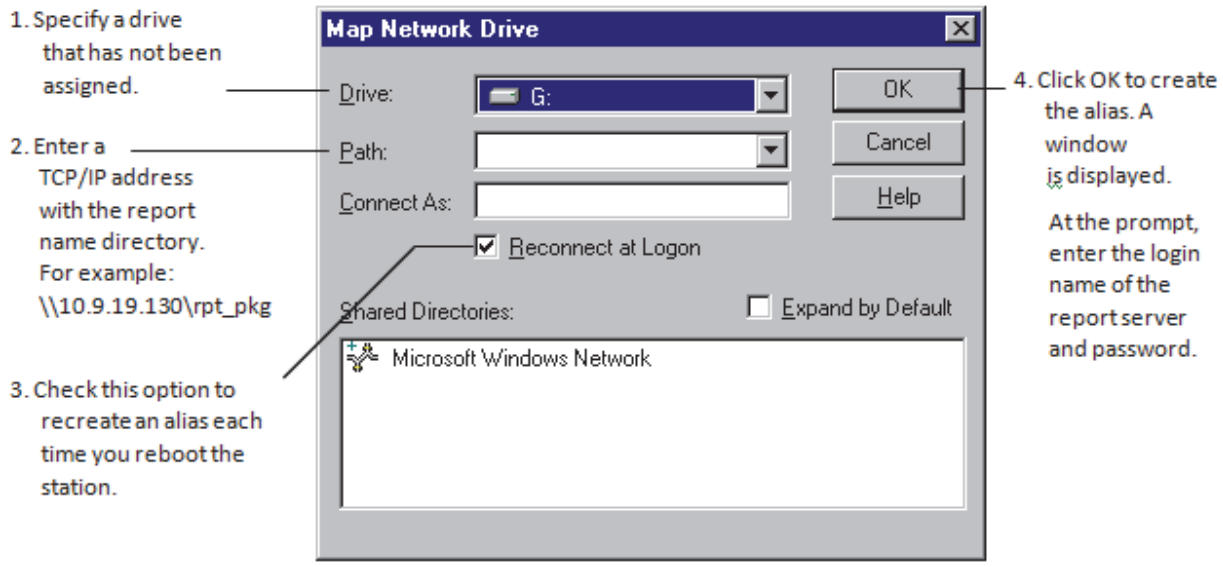


Figure 3-20. Map Network Drive Dialog Box

2. In the Drive pull-down list box, choose a drive that has not been assigned.
3. In the Path pull-down list box, enter a TCP/IP address with the report name directory, for example: \\10.9.19.30\rpt_pkg.

4. Executing Reports

This chapter explains how to configure and execute an On-Demand report and how to schedule a task to automatically run reports using Automize scheduler.

Reports can be executed on a scheduled basis or On-Demand. Reports are scheduled to run in advance by generating a time event and correlating it with a task. The task is performed when the time specified in the time event is reached.

Running an On-Demand Report

Reports can be run for the current time and date, or for an earlier date. To run a report On-Demand:

1. Open Explorer and select the **rpt_pkg** directory from the browser (Figure 4-1).
2. From one of the report folders, right-click a report and select **Run Now**.

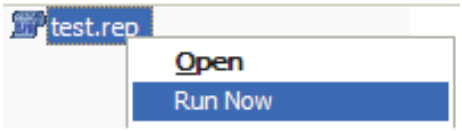


Figure 4-1. Report Pop-up Menu

The On-Demand Report dialog box is displayed.

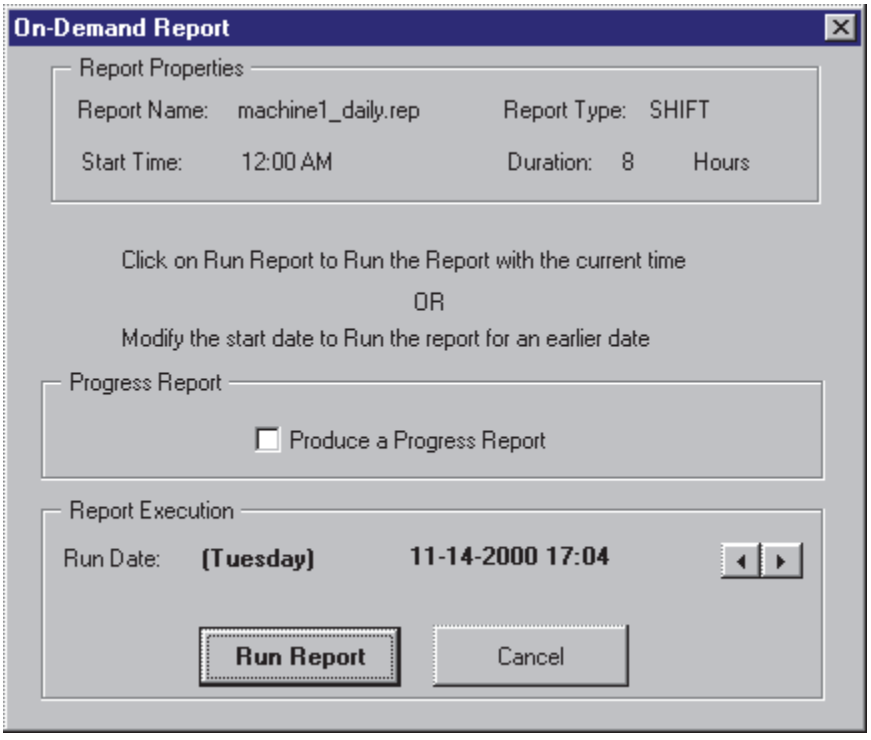


Figure 4-2. The On-Demand Report dialog box is displayed.

- To create a progress report rather than a full-period report, click the **Produce a Progress Report** check box.
- To specify an earlier date, use the Report Execution arrow keys.

3. Click **Run Report** to execute the report, or **Cancel** to close the dialog box.The report output is sent to its configured destinations.

TIP

Select a scheduled execution time that falls inside a collection period. Suggested schedule times for the default reports are listed in Table 4-1.

Table 4-1. Report Schedule Times

Default Report Type	Scheduled Run Time
Shift	8:05 A.M.
Daily	12:05 A.M.
Weekly	Sunday 12:05 A.M.
Monthly	First day of the month 12:05 A.M.

The finished report will be saved in the appropriate subdirectory (monthly, daily, shift, weekly) of the "reports_done" directory within the Report Package installation.
Example: *C:\rpt_pkg\done_reports\daily\myReport_05232010_0000.xls*

Time Synchronization

The AIM*Historian or the I/A Series Historian ODBC Library automatically adjusts the time specified in an SQL query to match the time of the historian server. The data returned is for a time interval based on the report server time. Therefore, when the report server and the accessed historian servers are not part of the same control network it is essential to manage the time synchronization between the servers in order to guarantee consistent reporting results.

For example, on "off platform" I/A Report Package installations an Automize task could be created and executed daily to synchronize the clock time of the report server and the historian server.

Scheduling a Report

Choose **Start > Programs > Automize9 > Automize9** or the desktop icon Automize9 to launch the Automize scheduler.

Automize Front Panel Overview

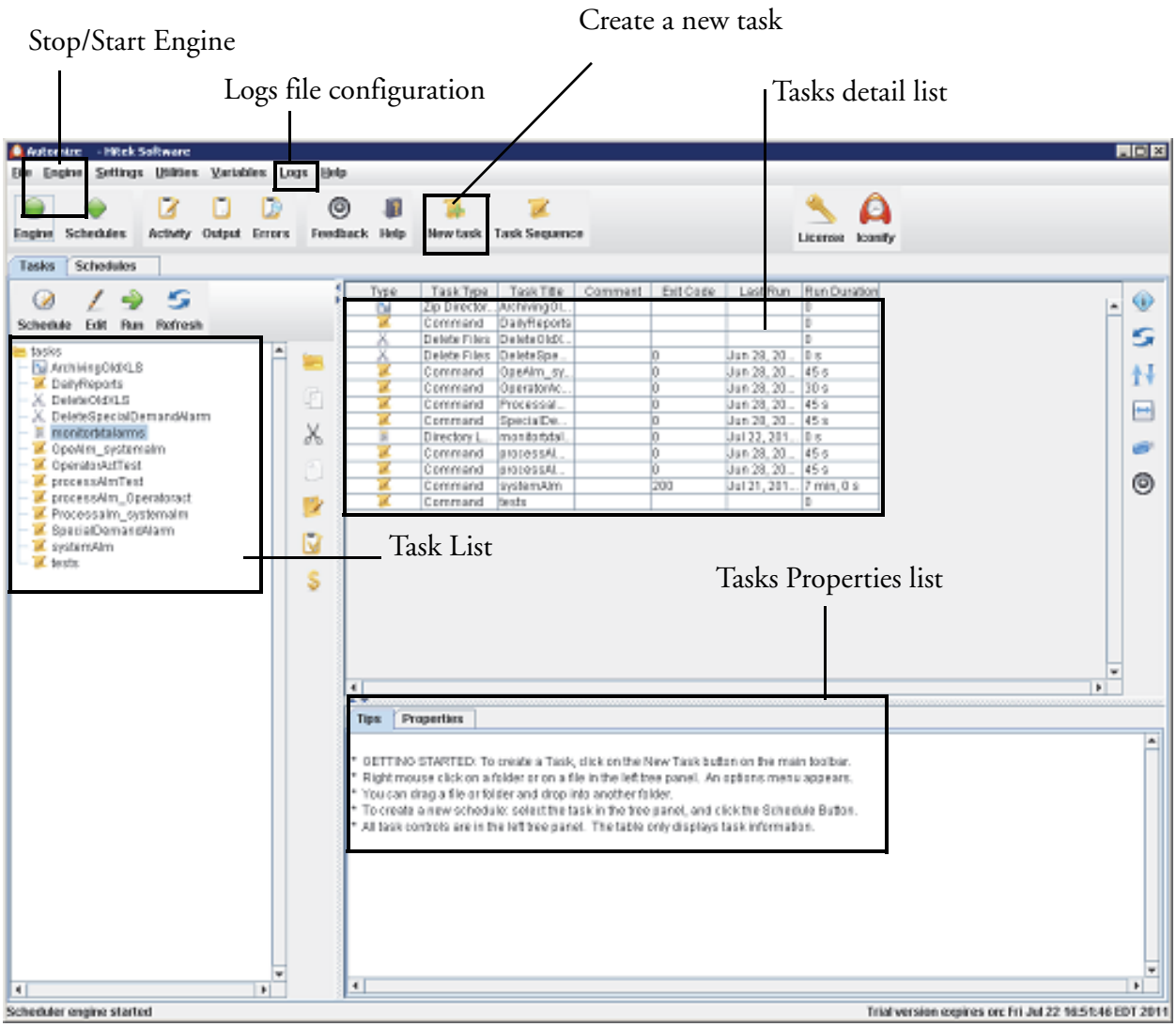


Figure 4-3. Automize Front Panel

Tasks and Schedules

The Automize scheduler allows you to create specific Tasks, such as the invocation of a Report execution, and specific Schedules that allow for the scheduling of the Tasks.

Note that a Task does not necessarily need to be scheduled. Such a Task will not be executed, unless it is triggered manually.

— NOTE

Before scheduling a newly created Task (e.g. daily report execution) it is recommended to test the Task. To launch the execution of the Task from the Automize right-click on the Task name listed in the Task list section and select "Run Task". Verify in the report output directory that the report has been correctly run before scheduling it.
If the Task was not executed as expected then the first troubleshooting step is to right-click on the Task name listed in the Task list and select "View Tasklog".

When creating scheduled Tasks that are dependent on each other's completion make sure that you allow enough time for the execution of each Task.

Example: Consider that one or more scheduled Tasks which run each night, the reports older than 1 day are archived daily to an archive location and finally the original reports are deleted afterwards.

In this case you must allow each Task sufficient execution time before the next scheduled Task starts: Run reports at 2:00 AM, archive at 2:30 AM and delete the old reports at 3:00 AM.

Using Template Files to Create a New Task

The easiest and fastest way to create a new Task is to use the template files that have been created during the installation of Automize. These templates have been automatically configured with information specific to your system.

— NOTE

It is recommended to use the template files rather than creating a new Task from scratch in order to minimize the risk of having configuration errors.

Creating a new Report Task

When creating a new report Task it is recommended to start by copying one of the existing template Tasks instead of editing the default template Task directly. This way the default template Task is preserved unaltered for the creation of other report Tasks.

Each type of report (Daily, Monthly, Shift, Weekly) has a dedicated template Task, with and without the Progress Report option, using the following naming convention:

<ReportType>-Report-[with-Progress-]TEMPLATE

Example:

Daily-Report-TEMPLATE for a Daily report without Progress Report

or

Weekly-Report-with-Progress-TEMPLATE for a Weekly report with Progress Report

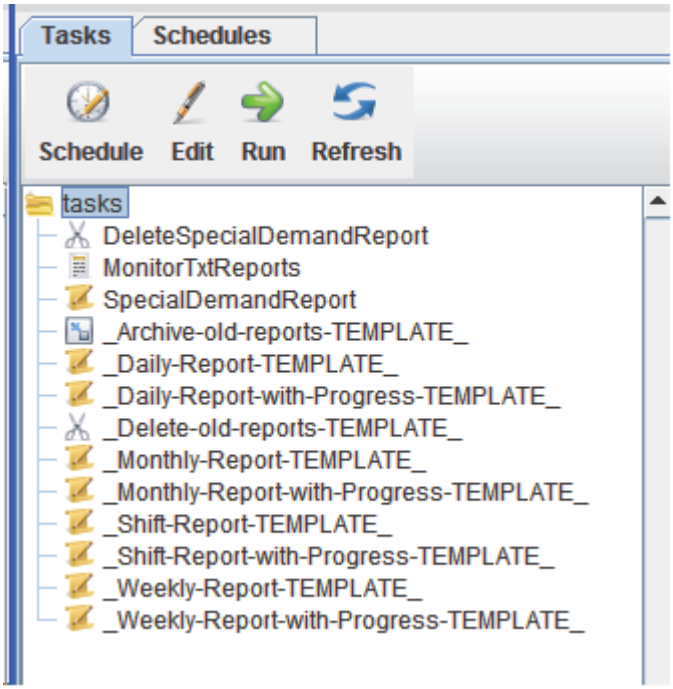


Figure 4-4. Automize Task Templates

In order to create a new Task select the appropriate template and execute the following steps:

1. Right-click on the Task template and select **Copy**. In the pop-up window enter the name of the new task (e.g. "Plant1-daily") and click **OK**.
2. Double click on the new task in order to open the task configuration window.
3. In the Command Line field, replace the **reportfilename.rep** with the file name of the report to be executed. In order to facilitate this step the filename is presented in lower-case letters while the rest of the command-line string is UPPERCASE. Pay attention not to modify the remainder of the field contents.

   Example:

   C:\PROGRAM FILES\MICROSOFT OFFICE\OFFICE14\EXCEL.EXE /r D:\RPT_PKG\REPORTS\SHIFT**reportfilename.rep** D:\RPT_PKG\REPORT_ENGINE.XLS
4. Adjust the timeout value that will prevent corrupt or poorly configured reports to block system resources indefinitely (the default timeout is set to 5 minutes). For large reports increase the timeout value sufficiently to guarantee the proper creation of the report.

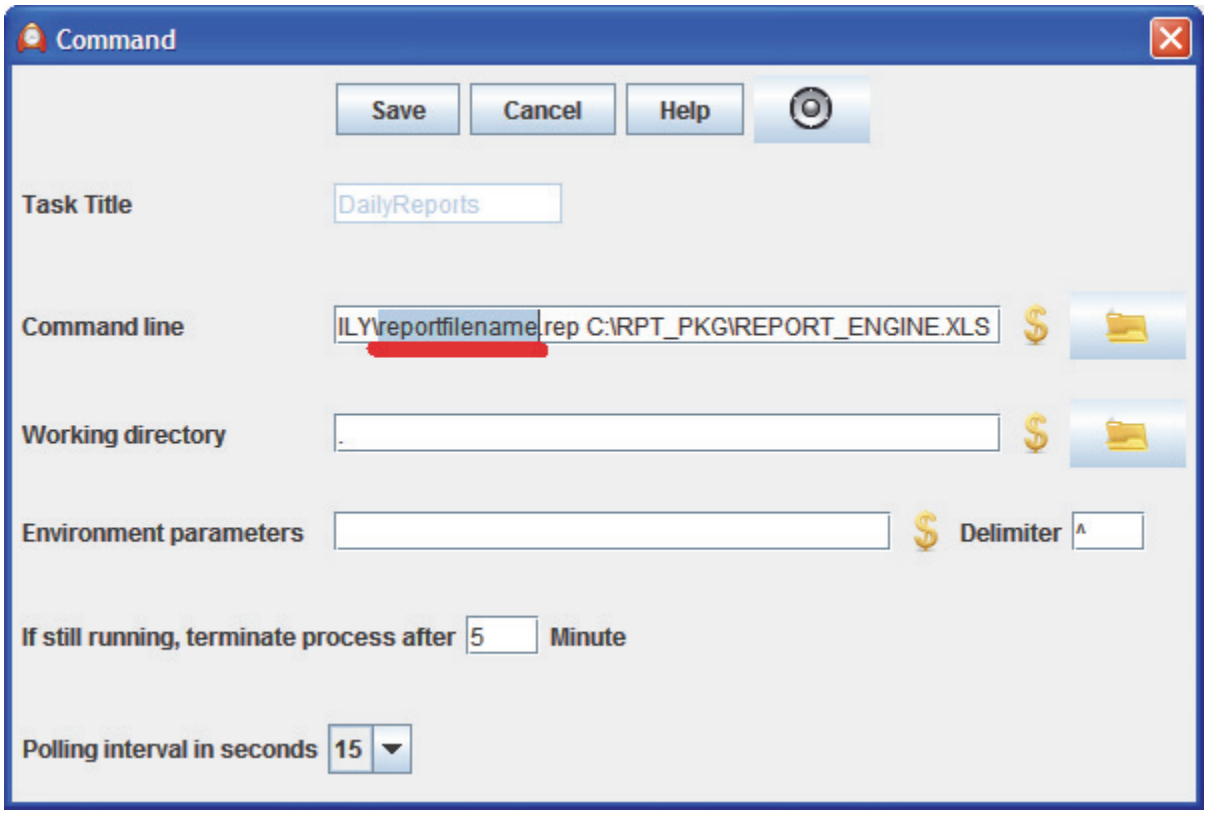


Figure 4-5. Automize - Changing the Report Filename

NOTE

Make sure to change only the report file name and preserve the remainder of the command line string. The ***reportfilename*** has to match exactly the file name as saved by the report builder. The files can be found in one of the Report Package reports directories. E.g. D:\rpt_pkg\reports\shift\

5. Click **Save**.
6. Right click on the Task and choose **New Schedule** to set the schedule. (See "Scheduling a Task" on page 56.)
7. Click **Save**.

Creating a New Task that Automatically Archives Old Reports

The executed reports accumulate on the report server in the done_reports and HTML subfolders. This section explains how to configure in Automize an archive Task to automatically archive old reports into a compressed zip-file after a specified period of time. This task will not delete the existing reports so a separate delete Task must be used to recover the used disk space. (See "Creating a New Task which Automatically Deletes Old Reports" on page 54)

1. Right-click on the task template **_Archive-old-reports-TEMPLATE_** and select Copy. In the pop-up window enter the name of the new task (e.g. archive-daily-reports) and click **OK**.
2. Double-click on the new task in order to open the task configuration window.

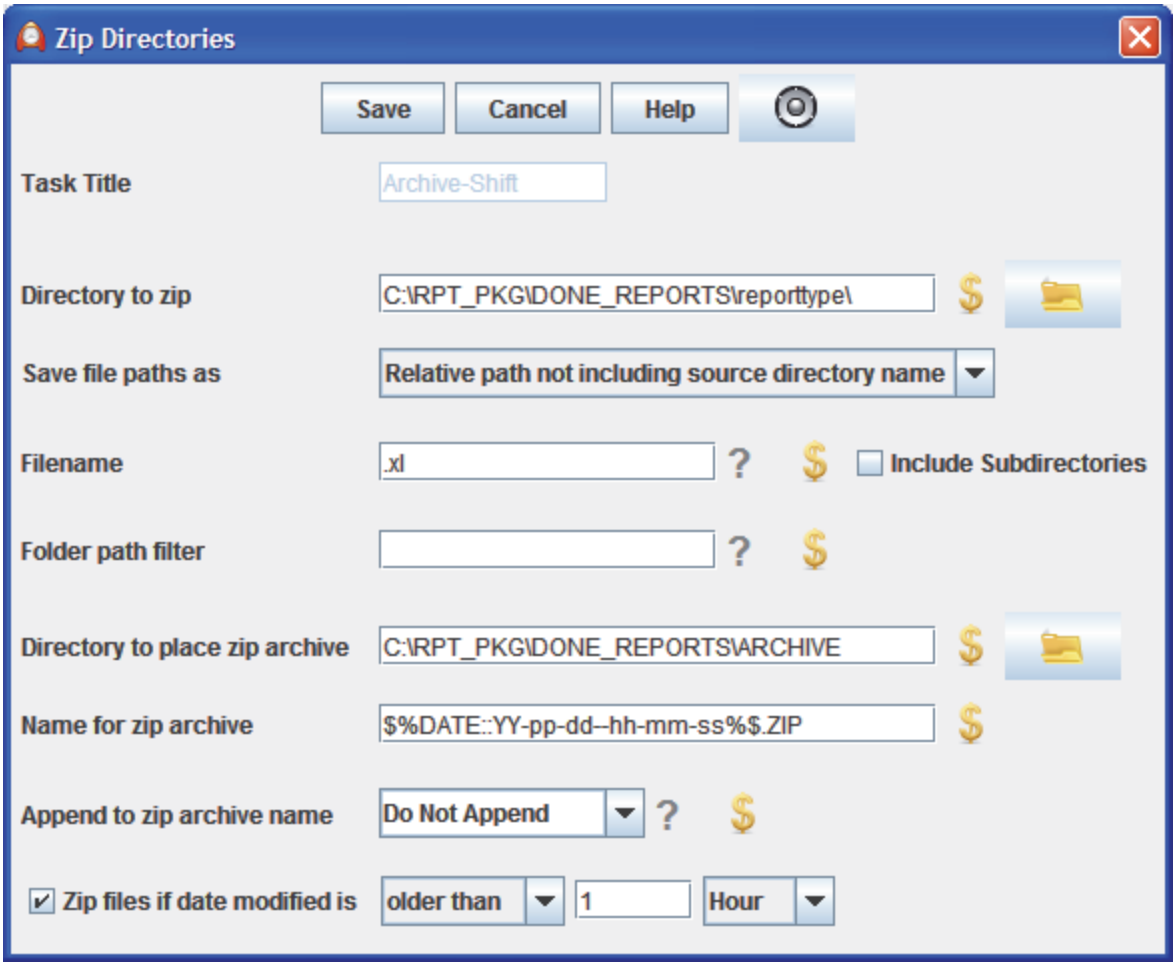


Figure 4-6. Automize9 Archive Report Dialog Box

3. To archive the Excel reports change the reporttype (in lowercase letters) to the desired report type (daily, monthly, weekly or shift) in the **Directory to zip** field. To archive the HTML reports you must additionally change the parent directory DONE_REPORT to html.
4. In the **Filename** field enter ".xl" for Excel or ".html" for HTML reports to be archived.

— NOTE

When the report package re-creates a report under the same name the existing report instance is renamed to have the extension ".xlk" (Excel backup file). Therefore for the Excel reports archiving Task above the extension used in the **Filename** field is ".xl" and not ".xls".

5. In the **Directory to place zip archive** field specify the ZIP archive storage location (default is the "ARCHIVE" subfolder of the "reports_done" folder). You may want to select here an external or network drive location.

NOTE

If the directory in the **Directory to place zip archive** field does not exist or is not accessible, then the archiving Task will fail.

6. In the **Name for zip archive** field the default setting $%DATE::YY-pp-dd--hh-mm-ss%$.ZIP will create archive with filenames like 2010-12-24-12:15:00.ZIP. You may want to add the type of the report at the beginning of the filename.

   (For example, Daily-$%DATE::YY-pp-dd--hh-mm-ss%$.ZIP which would result in Daily-2010-12-24-12:15:00.ZIP)

NOTE

You can also change the date/time separators like /, _, -, or : as well as changing the filename to a different format (like spelled out month names).
Please refer to the online help of Automize (in the menu select **Help > Help File > Variables > System Variables**).

7. At the bottom of the window, in the field at the right of the older than field, select the desired age of the files to be archived. It is recommended to run this task on a daily or weekly basis.
8. Click **Save**.
9. Right click on the archive Task and choose New Schedule to set the Schedule (see “Scheduling a Task” on page 56). It is recommended to schedule this Task on a daily or weekly basis.

Creating a New Task which Automatically Deletes Old Reports

This section explains how to configure an Automize delete Task to automatically delete reports older than a specified age.

1. Right-click on the Task template **_Delete-old-reports-TEMPLATE_** and select "Copy". In the pop-up window enter the name of the new task (for example, delete-old-Daily) and click **OK**.
2. Double click on the new Task in order to open the task configuration window.

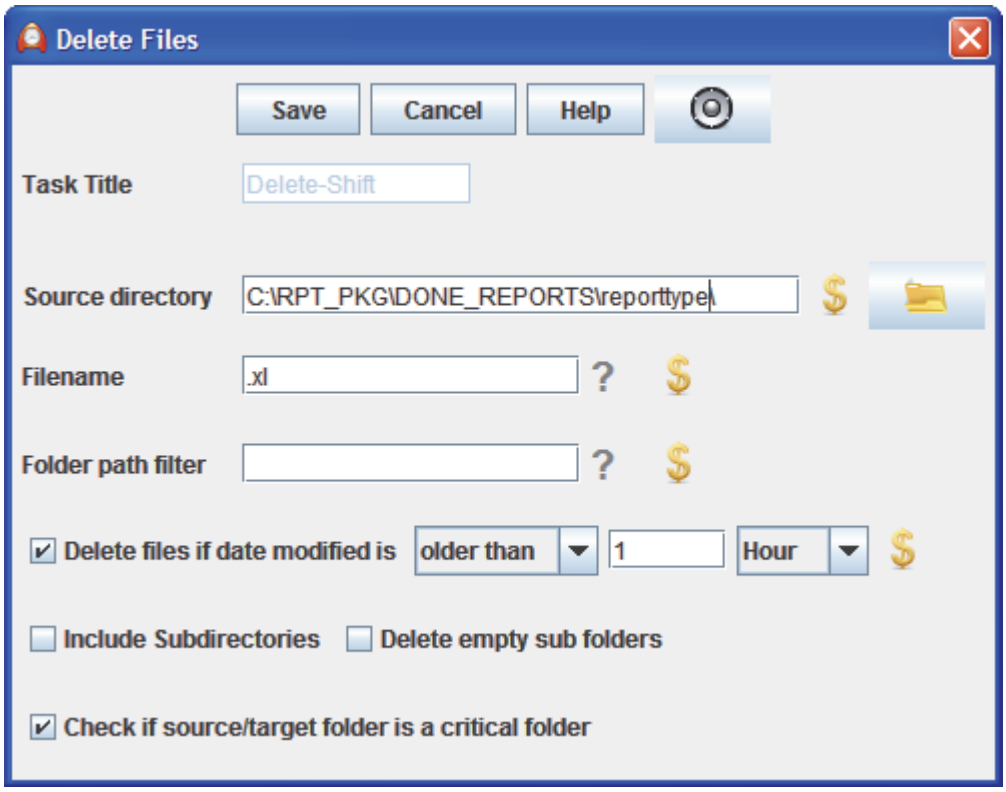


Figure 4-7. Automize9 Delete Report Dialog Box

3. To delete the Excel reports change the reporttype (in lowercase letters) to the desired report type (daily, monthly, weekly or shift) in the Source directory field. To delete the HTML reports you must additionally change the parent directory DONE_REPORT to html.
4. In the **Filename** field enter ".xl" for Excel or ".html" for HTML reports to be deleted.

NOTE

When the report package re-creates a report under the same name the existing report instance is renamed to have the extension ".xlk" (Excel backup file). Therefore for the Excel reports archiving Task above the extension used in the **Filename** field is ".xl" and not ".xls".

5. At the bottom of the window, in the field at the right of the **older than** field, select the desired age of the files to be deleted. It is recommended to run this task on a daily or weekly basis.
6. Make sure that the check-box **Check if source/target folder is a critical folder** is selected in order to avoid the accidental deletion of a critical system folder.
7. Click **Save**.
8. Right click on the deletion Task and choose **New Schedule** to set the schedule (see “Scheduling a Task” on page 56). It is recommended to schedule the deletion Task on a daily or weekly basis.

Scheduling a Task

1. Right-Click on the Task located in the **Tasks** tab and select **New Schedule**.

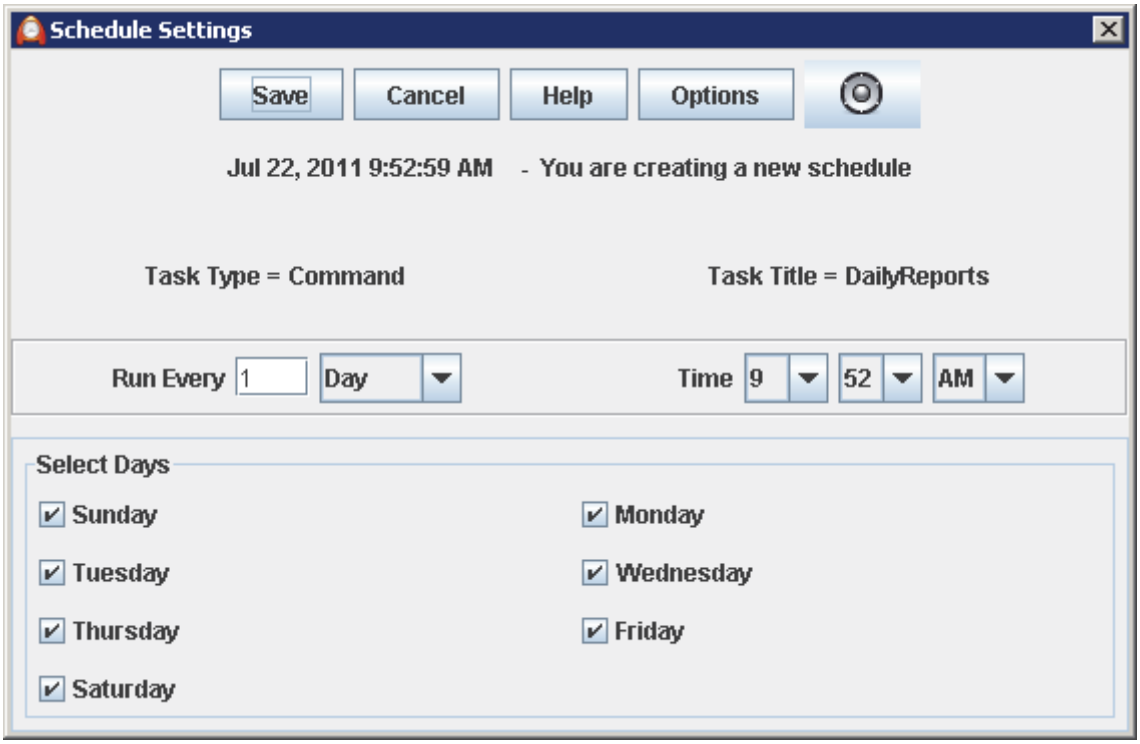


Figure 4-8. Automize9 Schedule Settings Dialog Box

2. Enter the scheduling parameters.
   a. "Run Every" field: Set the frequency of the task - for example, "Run every 1 day" for daily execution
   b. Time field: Set the scheduled time of the task execution.
   c. Select Days: Set on which days the task should be running. For example, you could exclude running a task on the weekend.
   d. For Advanced scheduling click **Options**.
3. Click Save.

Manually Triggering a Scheduled Task

An existing schedule can be triggered for execution at any time. Right click on the task and select **Run Task**.

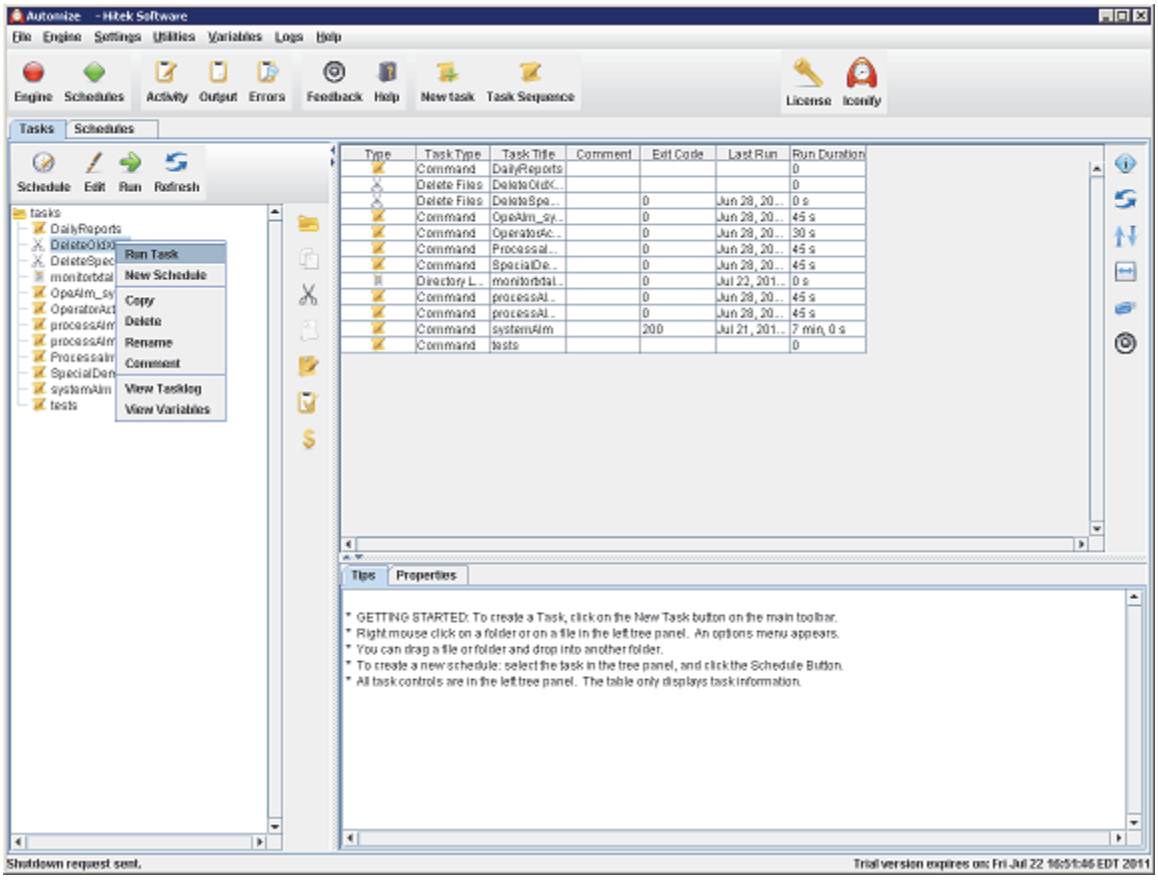


Figure 4-9. Run Task Menu

Configuring the Scheduler Log File

The Scheduler Log file lists by default the status of each task execution in chronological order.

For purposes of troubleshooting it is useful to increase temporarily the logging detail by including the activity log and the debug log information. Note that in this case the log files can grow very large in size over time, therefore the logging should be set back to the default settings when the troubleshooting is over.

To configure the Log file preferences:

1. Click **Logs > Preferences**.

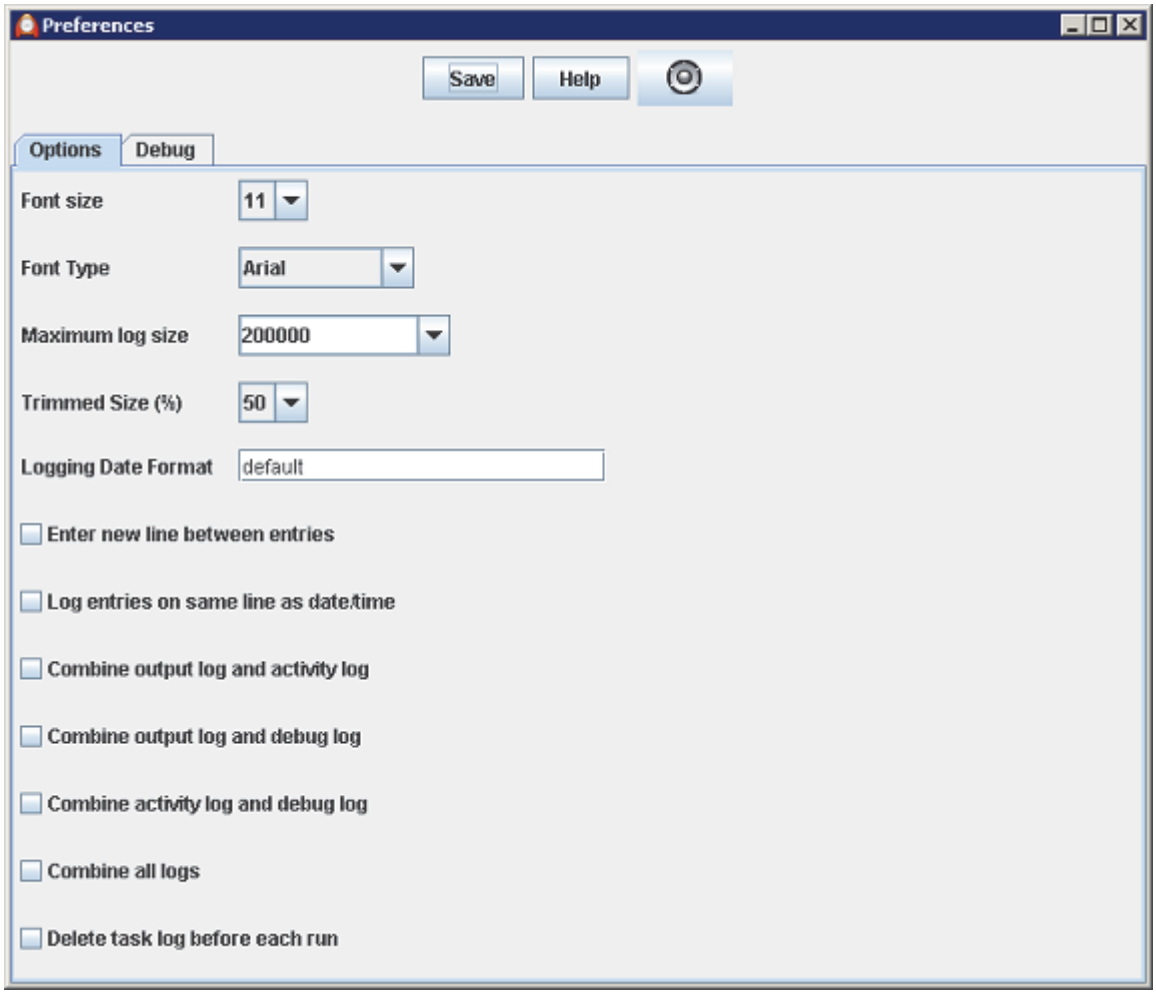


Figure 4-10. Log Preference Panel

2. Configure the Log preferences as required.
3. Click **Save**.

Special Demand Reports

Creating a Special Demand Report

Special Demand is a report execution request you submit in a text file. The text file must contain the following arguments with one argument per line and no blank lines:

- Path and name of the report to be run
- Start Date (or End Date if Duration is negative)
- Start Time (or End Time if Duration is negative)
- Duration (positive or negative)
- Destination path for the HTML-formatted report results
- Destination path for the Excel-formatted report results
- Pogress report flag

- Optional Prefix to add to the final report name.
- Flag to inhibit printing
- Flag to inhibit the HTML format output
- Flag to inhibit the email sending

The text file can have any name. Four examples are shown in Figure 4-11 and Figure 4-12.

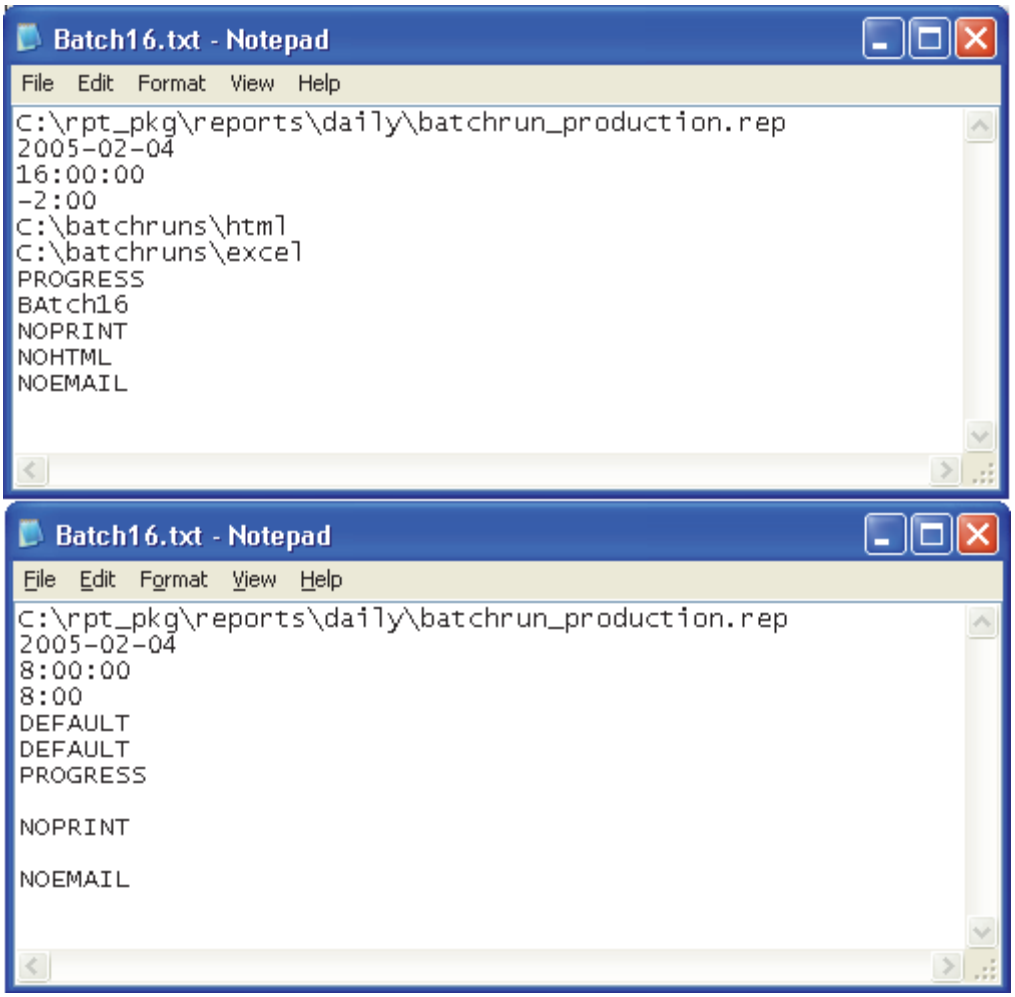


Figure 4-11. Special Demand Text File Formats (1 of 2)

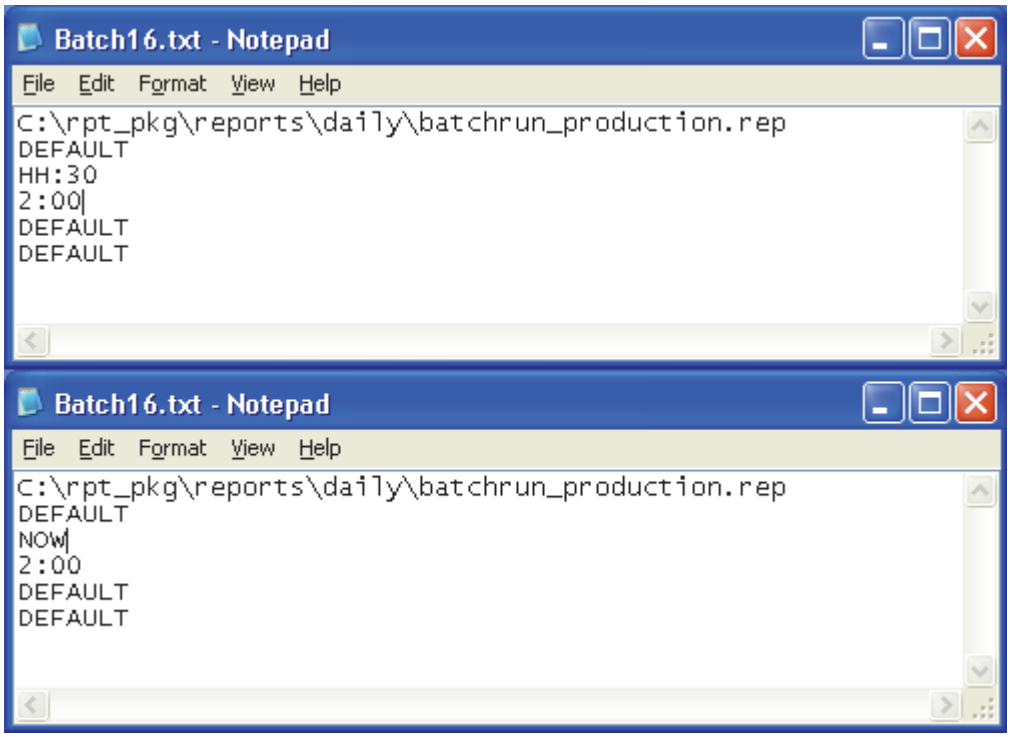


Figure 4-12. Special Demand Text File Formats (2 of 2)

Each argument in the Special Demand Information text file must be listed in the specified order, and each argument must be on a different line, with no lines empty, as described below. Lines may not be commented out.

- Line 1 (mandatory argument) contains the full report path and name, with extension.
- Line 2 (mandatory argument) contains the Start Date.

  Use the format **yyyy-mm-dd**. Alternatively, use the keyword **DEFAULT** to default to the current date.

— NOTE

This argument is interpreted as the End Date if the Duration argument is negative.

- Line 3 (mandatory argument) contains the Start Time.

  Use the format **h:mm:ss.** Alternatively, use the keyword **DEFAULT** to default to the start time configured in the report.

  This parameter is not used for a weekly or a monthly type report but is still required in the file.

— NOTE

This argument is interpreted as the End Time if the Duration argument is negative.

Use the format **HH:xx** to specify the minutes in the current hour as End time. If **xx** is larger than the current minutes, the preceding hour is used. Note that, with this option, the duration is considered as a negative duration.

Use the keyword **NOW** to use the current hour and minute as End Time. Note that, with this option, the duration is considered as a negative duration.

- Line 4 (mandatory argument) contains the Duration.
  - Specify **h:mm** for shift or daily type reports.
  - Specify a **number of days** for weekly or monthly type reports.

  It is also possible to specify a negative duration, such as -h:mm or -number, in which case the Start Date/Start Time arguments are effectively interpreted as the End Date/End Time of the report.

  Alternatively, use the keyword **DEFAULT** to default to the duration configured in the report.

  If the line 3 uses the keyword **NOW** or the **HH:xx** option then the duration is considered as a negative duration.
- Line 5 (mandatory argument) contains the alternate path for the HTML-formatted report results.

  Use the keyword **DEFAULT** to save the HTML-formatted file to the HTML location configured in the report.
- Line 6 (mandatory argument) contains the alternate path for Excel-formatted report results.

  Use the keyword **DEFAULT** to save the Excel-formatted file to the XLS location configured in the report.
- Line 7 (mandatory argument) contains the Progress Report option flag. Enter one of two keywords:
  - **Progress** to produce a progress report
  - **Full** to produce a full report.
- Line 8 (optional argument) contains a prefix that can be added to the final report name to identify the batch. The prefix must be one contiguous word with no spaces.

  This option is ignored if Line 8 is left blank.
- Line 9 (optional argument) contains the flag used to inhibit printing.

  Use the keyword **NOPRINT** to inhibit printing.

  This option is ignored if Line 9 is left blank.
- Line 10 (optional argument) contains the flag used to inhibit the HTML format output.

  Use the keyword **NOHTML** to inhibit the HTML format output.

  This option is ignored if Line 10 is left blank.
- Line 11 (optional argument) contains the flag used to inhibit the email sending.

  Use the keyword **NOEMAIL** to inhibit the email sending.

  This option is ignored if Line 11 is left blank.

Automize Configuration for the Special Demand Reports

In order for the special demand reports to be executed, Automize must be configured to periodically scan (or monitor) the folder **\rpt_pkg\reps_to_run**.

The default set of Automize templates already contains the three tasks necessary for the Special Demand Reports operations: **MonitorTxtReports, SpecialDemandReport** and **DeleteSpecialDemandReport**. These Tasks shall not be altered. The **MonitorTxtReports** Task is the only Task that needs to be scheduled. Do not schedule the other two tasks!

The Schedule shall define how often Automize will check for new or modified requested special demand reports. The recommended value for the Schedule frequency is 10 seconds in order to preserve overall system performance.

In order to set-up the monitoring of the directory for special demand reports the following steps are necessary:

- Right click on the **MonitorTxtReports** task and choose **New Schedule** to set the schedule.
- Enter **10** in **Run Every** field and select **Second** from the drop down list for the time units.
- Click **Save**.

Triggering a Special Demand Report

To trigger a Special Demand Report:

1. Create a text file as detailed in “Creating a Special Demand Report” on page 58.”
2. Copy the text file to the \rpt_pkg\reps_to_run folder.
3. Examine the Automize9 log to view the result of the operation in the log.

5. Report Directory Structure and Files

This chapter defines the directory structure where reports are stored.

Built reports are saved under the reports directory (“Executed Reports” on page 63). Report results are stored in the done_reports directory within the corresponding report type folder.

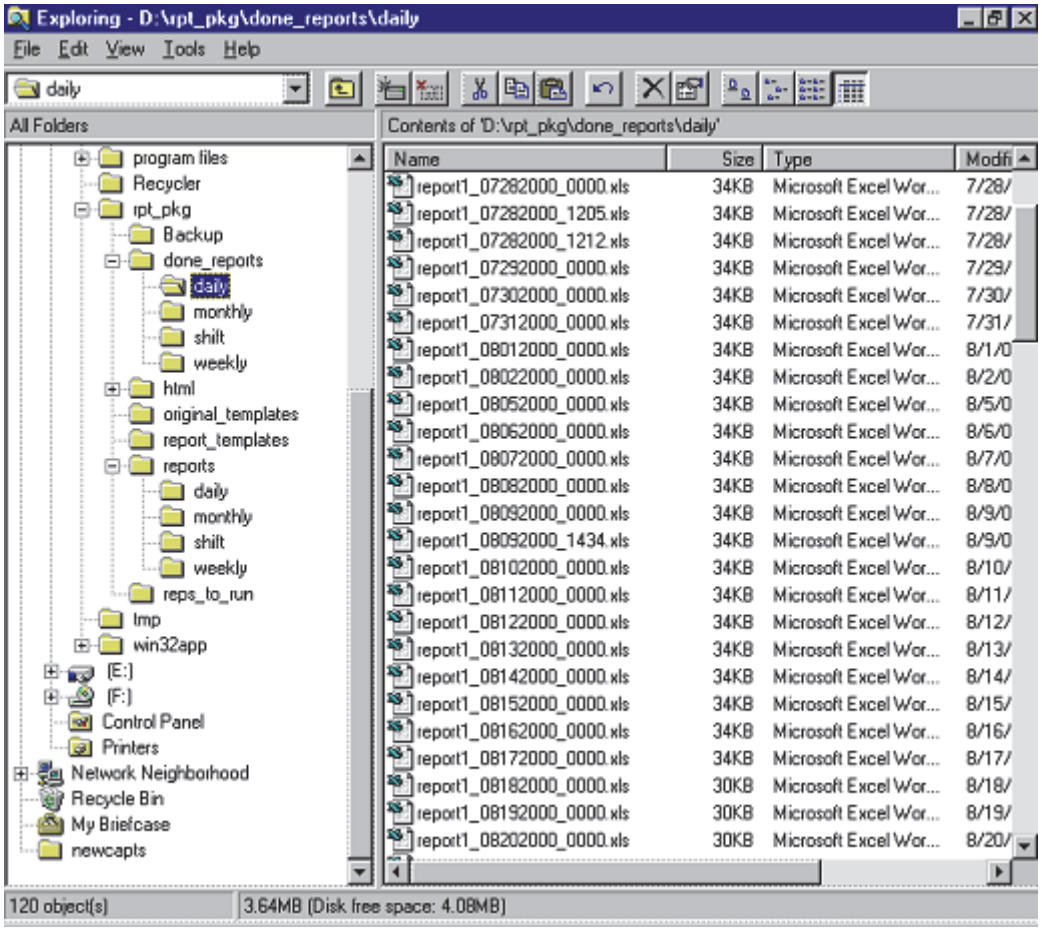


Figure 5-1. Executed Reports

If the HTML option has been selected, the results are converted to a Web Browser Viewable document and saved under the html directory

6. Web Reports

This chapter explains how to generate and customize a Report Home Page.

Web Reports Home Page Auto-Update

The I/A Series Report Package can be configured to automatically generate a Reports Home Page. Report results can then be viewed from the Reports Home Page.

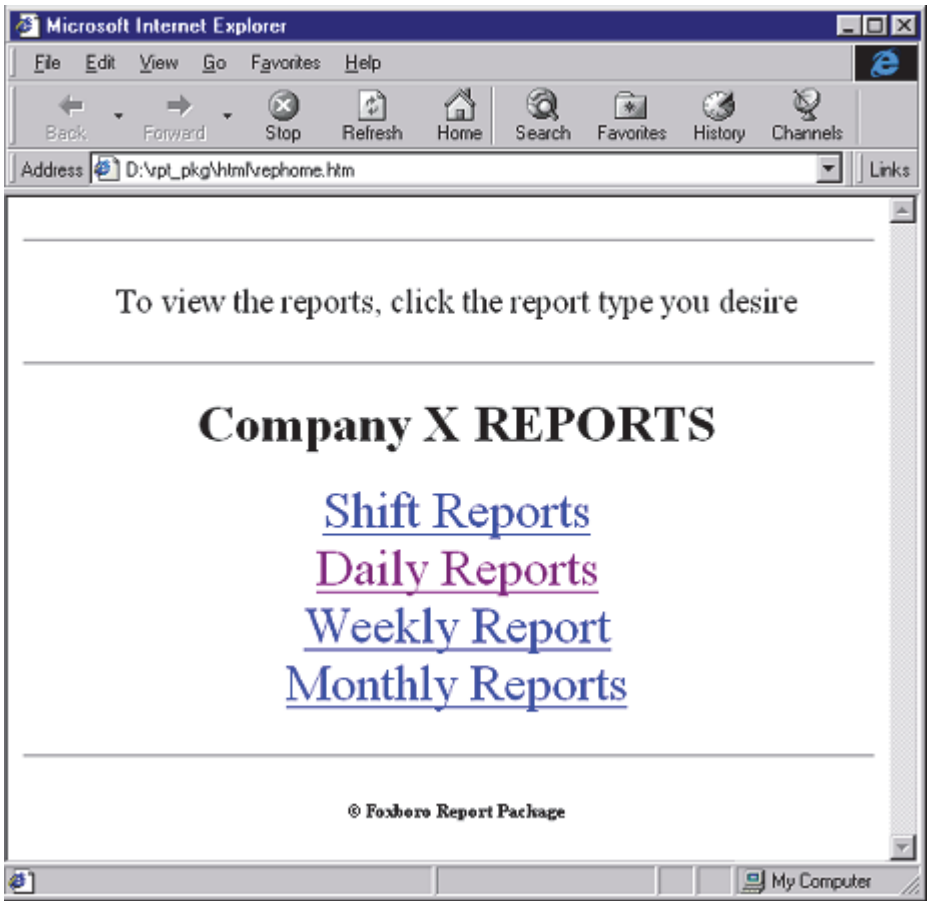


Figure 6-1. Reports Home Page Window

To customize the Reports Home Page, use a text editor to edit the Home Page and replace Company X with the name of your company.

The Reports Home Page has five pages that can be customized:

- Rephome.htm
- Daily_head.htm
- Shift_head.htm
- Weekly_head.htm
- Monthly_head.htm.

Web Browser for Operator Environment

HTML reports, generated by the I/A Series Report Package, can be viewed using a standard Web Browser (NetScape™, Internet Explorer). The Web Browser allows you to view previously executed reports without having to print the reports.

Following a Report Execution, the Home pages (Daily, Monthly, and so forth) are automatically updated with the link to the new Report Output.

If the Home page was already opened:

- Choose View > Refresh from the Internet Browser to display the updated report.

Connecting the Web Browser to a FoxView Button

The Web Browser can be started directly from the FoxView™ Environment, however, the FoxView button must be configured to start the Internet Explorer.

Use the following command to start the Internet Explorer from a FoxView button:

"dmcmd run iexplore.exe" -l "REPORTS"

where -l "REPORTS" sets the label of the button.

7. Troubleshooting

This chapter lists possible problems and recommended solutions.

Troubleshooting and Log File

An rb.log file is maintained in the I/A Series Report Package root directory. The log file contains error and warning messages returned by the Report Engine. Refer to the log file when troubleshooting problems with running a report.

Table 7-1 lists possible problems and recommended solutions when running the I/A Series Report Package software.

Table 7-1. Possible Problems and Corrective Action

Problem	Action
When importing the historical tables or the historized tags, a window is displayed requesting the user to select the "Invensys I/A Series Historian Server".	Either you are not authorized for ODBC access of the historian, or your user account does not have the required permissions. On the server, verify the an_init.tcp file or use an_setup to modify the user permissions.
When importing the historical tables or the historized tags, a window displays the message: "0 Communications. Problem with FoxAPI Server."	The API server is not running on the server, or the IP Address for the server configured in the an_init.fcg locally on your PC is incorrect. Make sure the API server is running on the server and verify that you can ping the server.
When importing the historical tables or the historized tags, a window displays the message: "No Reductions Found."	If this happens: Repeat the operation more than once.
When a report is run, data may be returned as zero with a question mark after it (0?).	If this happens, it means that the sample data has bad quality status. It means that the linearized sample data had bad quality for its last sample during its linearization period. It means that the reduced data did not meet the "percent valid" parameter in the AIM*Historian reduction group configuration for its reduction period.

Table 7-1. Possible Problems and Corrective Action (Continued)

The historical data is not imported into the report when the report is run. Instead of data, the following displays in the cells: NCON. NDSQL, NDA, ND	NCON in the cell: The report_engine could not connect to the historian Database. Check the definition of your tag. Check the connection between the PC and the AW. Verify that the API server is running on the AW.
	NDSQL in the cell: The connection to the historian DB was successful but the query for the data failed. Verify that the tag is still in the historian and that the reduction table exists.
	NDA in the cell: There was no data available for the time period.
When importing the historical tables or the historized tags, a window displays the message: "Error 429: Active X component cannot create object"	The message points to an error while accessing the Microsoft DAO (Data Access Object) function. By default, this report package uses DAO 3.5.1. If DAO 3.5.1 does not exist, the pack- age uses DAO 3.60 without problems. Although some systems may have multiple versions of DAO installed and registered, this is usually not a problem. The problem may be caused by DAO 3.50. The DAO 3.50 library and DAO 3.51 library are both named DAO350.dll. If your system has DAO 3.50 installed, unregister it by typing the following at the command prompt: cd \Program Files\Common Files\Microsoft Shared\DAO regsvr32 /u DAO350.dllCopy the file into the \WINNT\SYSTEM32 directory.
Excel cannot locate the xlhtml.dll file.	If you get this message: Copy the xlhtml.dll file to the same directory where Excel is installed. If the program persists:
When running the report, a window displays the message: "The file you specified does not exist."	If specified html directory where you are to save the html files does not exist. Create the directory and run the report again.
When the report is run, a window displays a message that the file is corrupt.	If this happens: Open the report file in Excel, simulate a change and save the report.

Appendix A. Configuration File (.ini file)

This appendix defines the configuration file used by the I/A Series Report Package.

The configuration file used by the I/A Series Report Package is rb.ini. The file is stored in the default directory *d:\rpt_pkg*. All lines in the configuration file are mandatory and case sensitive.

```
[Folders]
RepPkgDoneDir=D:\rpt_pkg\Done_Reports
RepPkgHtmlDir=D:\rpt_pkg\Html
AnInitFile=C:\Program Files\aim\Common\an_init.cfg

[Others]
RepTraceLevel=3
Qoff=0
E-mailProfile="Microsoft Outlook"
FormatTimestamps=YES

[Smtp]
SmtpServer=
SmtpFromAddr=
SmsmtpServerPort=25
SmtpConnectionTimeout=10
SmtpAccountName=
SmtpAuthenticate=0
SmtpUserName=
SmtpPassword=
smtpUseSSL=0
```

The configuration file is defined as follows:

[Folders] section:

RepPkgDoneDir	The directory where the report results are saved.
RepPkgHtmlDir	The directory where the web version of the report results are saved.
AnInitFile	The full path of the an_init.cfg file.

[Others] section:

RepTraceLevel	Determines how much information is logged in the log file. To enable logging of the database (AIM*Historian or I/A Series Historian) database queries, set RepTraceLevel to 3.
Qoff	The query offset (in hours) for the queries made to the AIM*Historian or I/A Series Historian database.
E-mailProfile	The e-mail profile of the user.
FormatTimestamps	The flag that allows the cells that contain a time stamp to be formatted. ♦ **FormatTimestamps=YES**: The format of all the time stamp fields in reports is dictated by the I/A Series Report Package. If the defaults are not to the user's preference, then refer to the FormatTimestamps=NO option. ♦ **FormatTimestamps=NO:** The format of a time stamp field abides by the format of its corresponding cell in the .rep file. The user can open the .rep file with Excel and adjust the cell formats to his own preference.

[Smtp] section:

SmtpServer	Set the IP or DNS Name of the SMTP server to be used, default **empty**.
SmtpFromAddr	Set the Email header "from" entry to be used, default **empty.**
SmtpServerPort	Set the SMPT server port, default **25**.
SmtpConnectionTimout	Set the connection timeout (seconds), default **10**.
SmtpAccountName	Set the same as the SmtpUserName, default **empty**.
SmtpAuthenticate	Set to 1 if login is required, default is **0**.
SmtpUserName	Set the User Name if login is required, default is **empty**.
SmtpPassword	Set the User Password if login is required, default is **empty**.
SmtpUseSSL	Set to 1 if SSL is required, default is **0**

Appendix B. Report Examples

This appendix provides examples of daily reports, weekly reports and a Final Data Worksheet.

Daily Report Examples

Figure B-1 illustrates a daily report built using the Report Builder. Figure B-2 illustrates the daily report results of an on-demand execution.

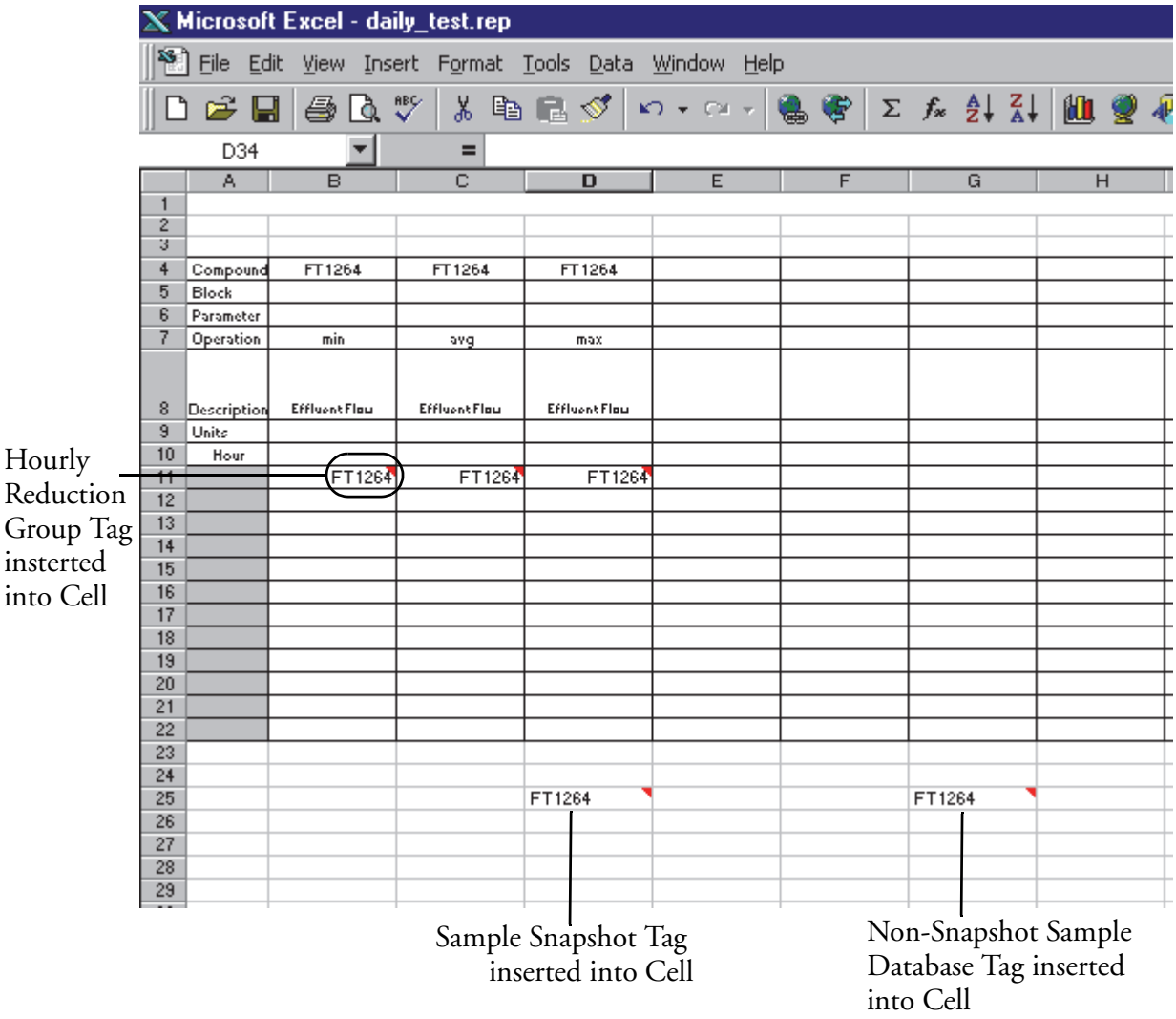


Figure B-1. Daily Report Built Using the Report Builder

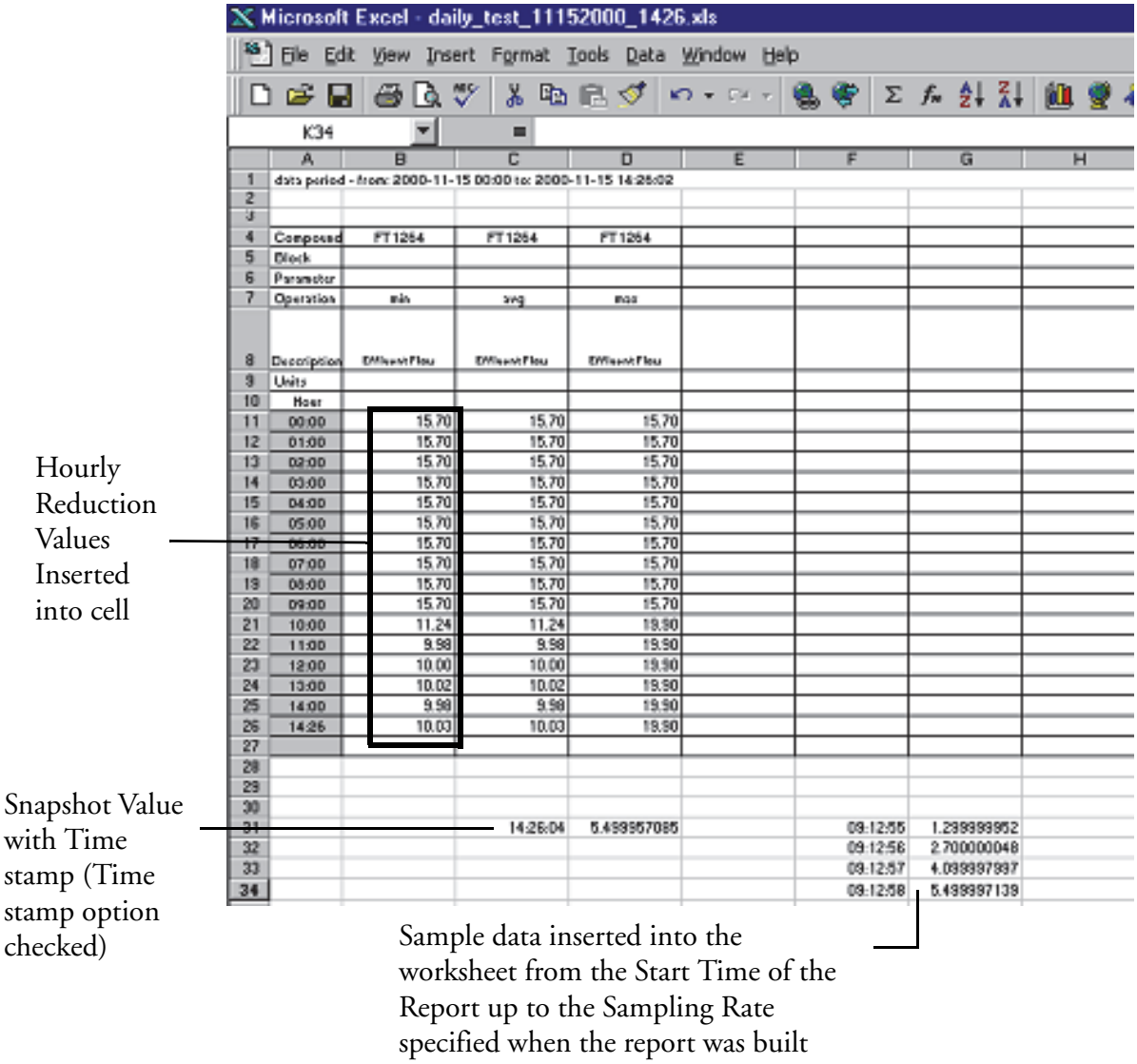


Figure B-2. Daily Report Results of an On-Demand Execution

The time stamp of sample data is always inserted one column left of the values regardless of the time stamp option.

Weekly Report Examples

Figure B-3 and Figure B-4 illustrate two approaches to retrieving reduction data.

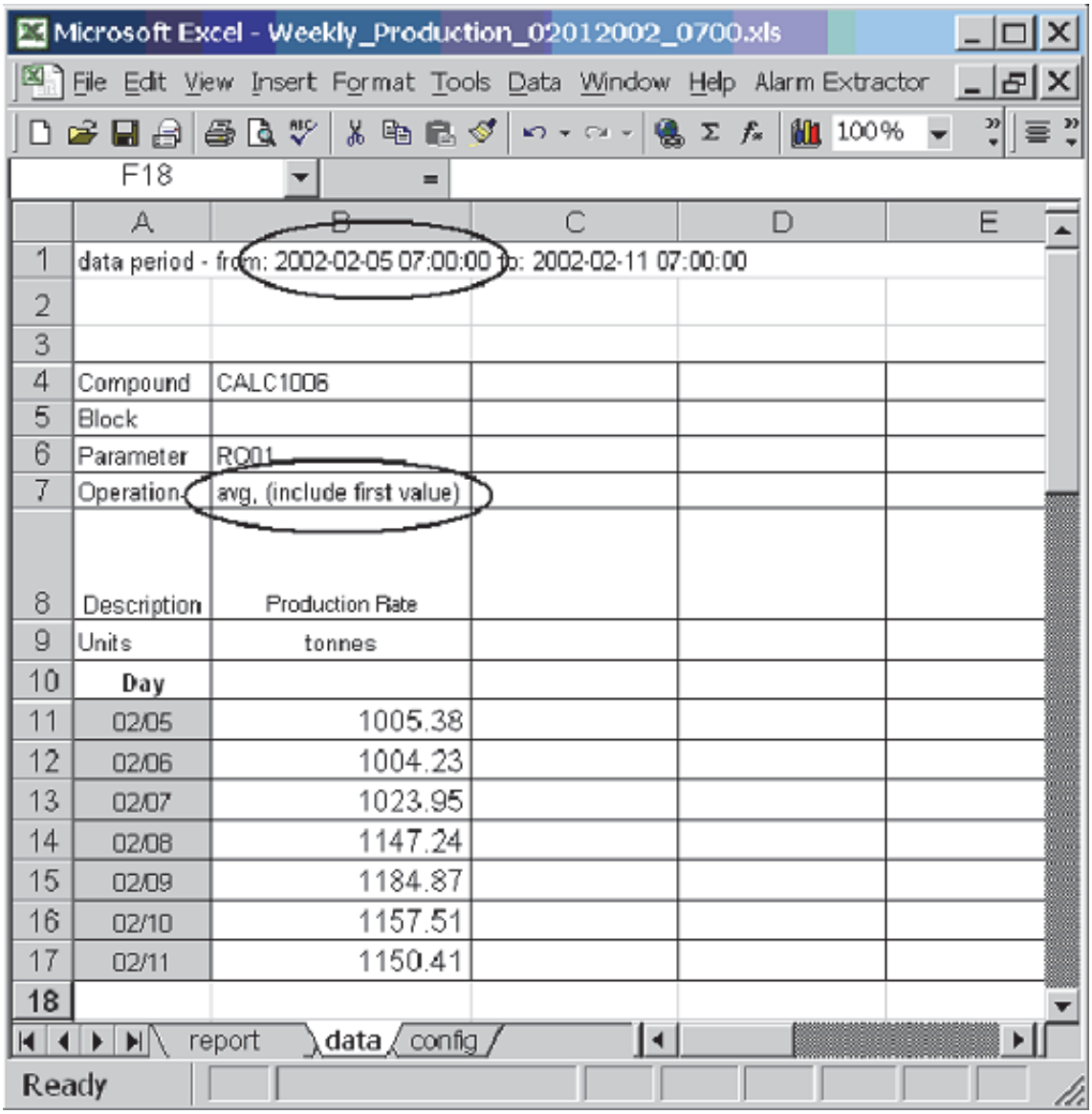


Figure B-3. Weekly Report with Reduction Data and First Value Included

This weekly report (Figure B-3) has a start day of Tuesday, February 5, 2002 with a duration of 04 days and a maximum of seven rows. This allows the report to be run on Monday, Feb. 11 after 7 A.M. to obtain daily reduction values on sample data from Monday, Feb. 4 at 7 A.M. to Monday, Feb. 11 at 7 A.M. This report was generated without the Ignore First Value option enabled. Figure B-4 shows a weekly report containing reduction data retrieved with the Ignore First Value option selected.

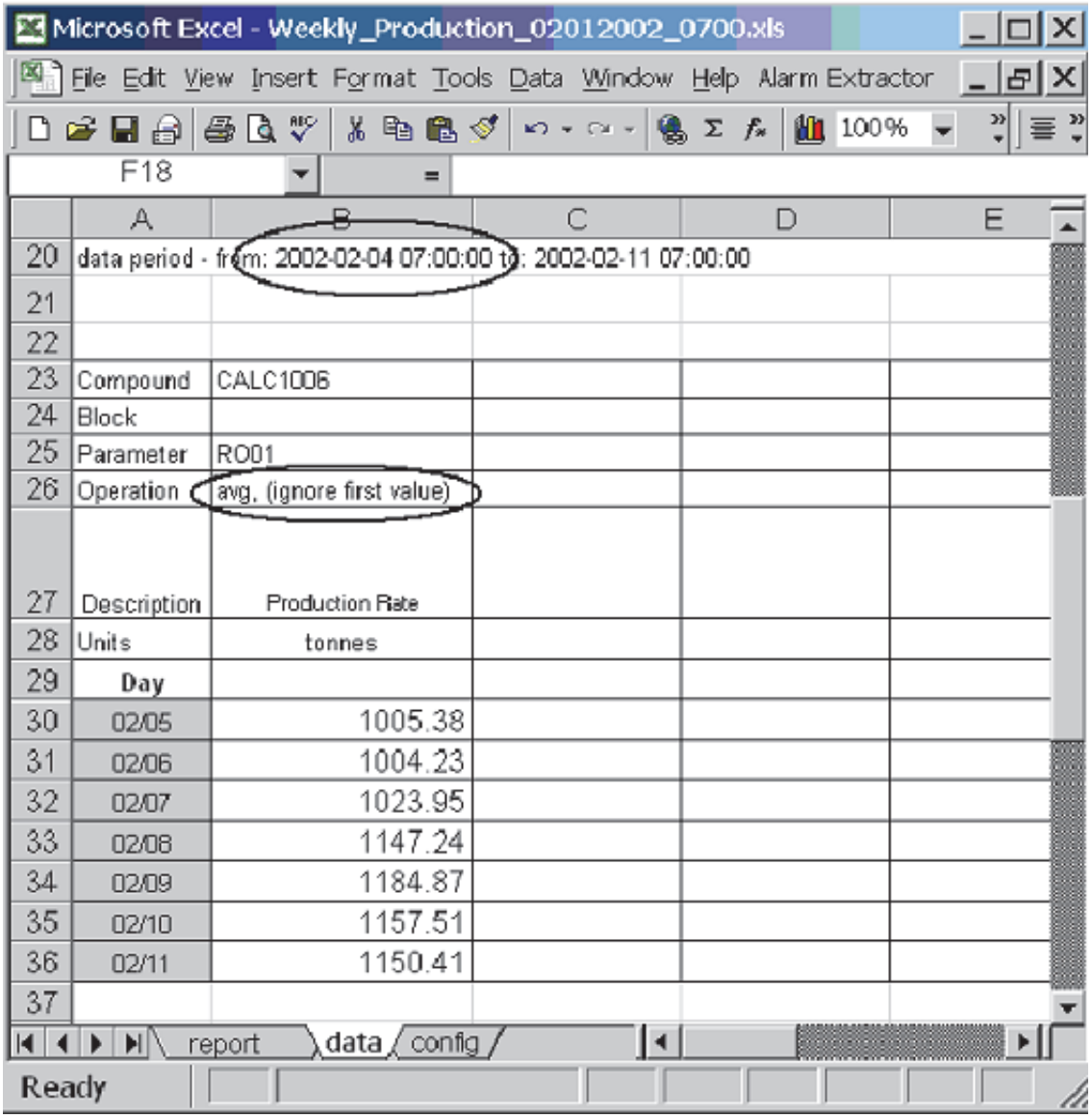


Figure B-4. Weekly Report with Reduction Data and First Value Ignored

This weekly report has a start day of Monday, February 4, 2002 with a duration of 07 days and a maximum of seven rows. This allows the report to be run on Monday, Feb. 11 after 7 A.M. to obtain daily reduction values on sample data from Monday, Feb. 4 at 7 A.M. to Mon- day, Feb. 11 at 7 A.M. This report was generated with the Ignore First Value option selected.

Customizing the Final Data Worksheet

You can use Excel functions and features to customize the presentation of a final data worksheet (Figure B-5). This can be applied in the approach used to illustrate the report results as shown in Figure B-3 and Figure B-4. Although the Final Data Worksheet was simply named "report" in these examples, you may assign any name you choose to the Final Data Worksheet.

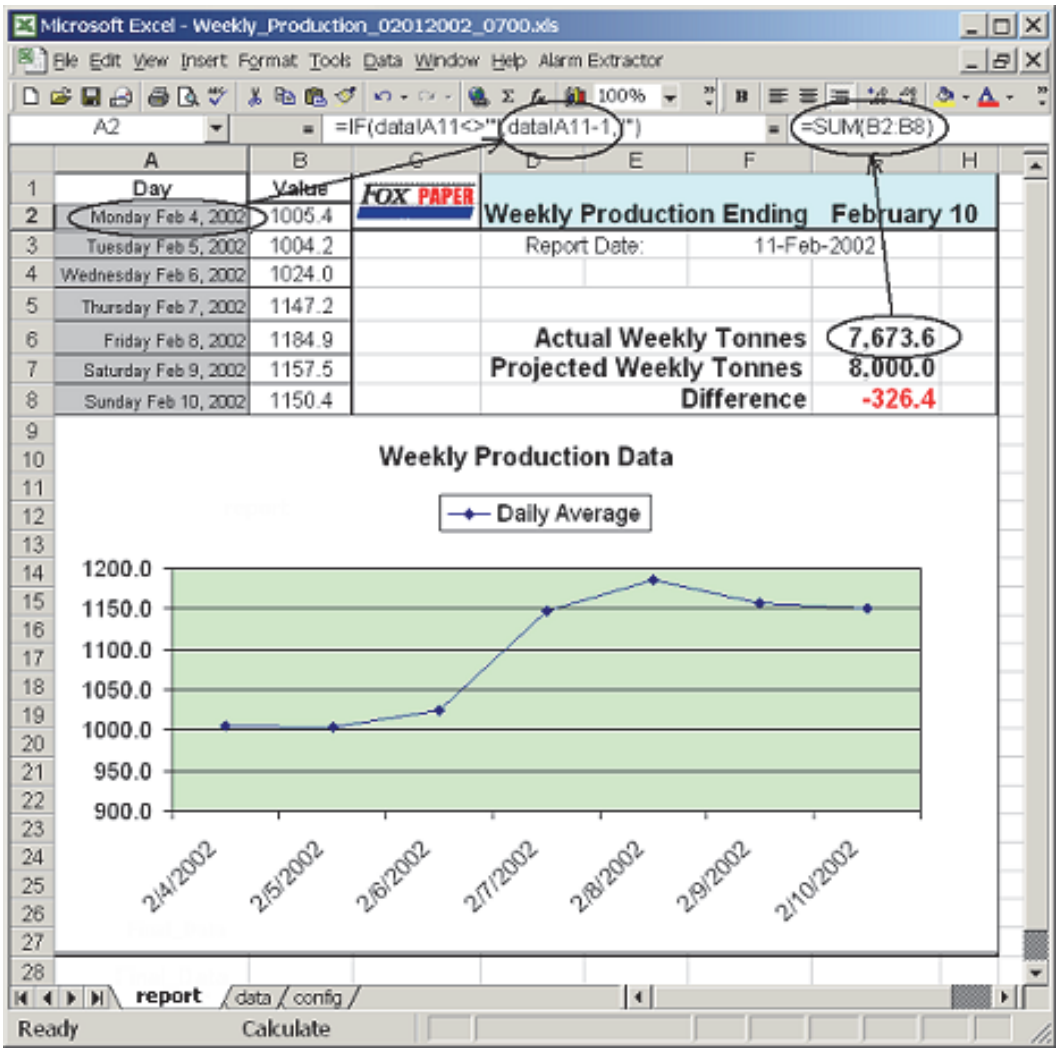


Figure B-5. Final Data Worksheet

In the example illustrated, notice the subtraction of one day from the original timestamp. This means that the reduction of the samples taken between Monday, February 4, 2002 7:00 A.M. and Tuesday, February 5, 2002 7:00 A.M. is presented with the "Monday, Feb. 4, 2002" timestamp, instead of the original "Tuesday, Feb. 5, 2002" timestamp.

Appendix C. User Macro Code Template

This appendix provides a template for creating macros.

```
Public Sub ReportPackageUserMacro(ByRef StarTime As String, ByRef
EndTime
As String)
```

This macro allows you to perform functions and calculations after the report has been run.

The subroutine is started automatically by the report_engine and enabled when the Macro check box on the Option menu is checked. For more information, refer to "Macro Option" on page 41.

The report_engine saves a backup copy of the report (.xlk), and saves the report again after this macro is run.

Alerts are disabled and errors ignored to prevent the report from stopping upon an error in the user code.

On Error Resume Next

Application. DisplayAlerts = False

```
'====================================================================
 INSERT CODE HERE
'====================================================================
```

Appendix D. Updating Existing Reports

This appendix provides instructions on how to update reports from version 5.0 (and below) to version 5.1 (and above).

Between version 5.1 and version 5.2 the report format has not been changed and no further update is necessary. Thus, if you are upgrading from version 5.0 or earlier please follow the steps in this section. If you are upgrading from version 5.1 you can skip this section.

NOTE

Before running the update, backup the folder \rpt_pkg\reports within your Report Package installation directory.

Updating Reports from Version 5.0 to Version 5.1

Starting with version 5.1, you can configure the data reduction retrieval to exclude the reduction value at the start of the report period. This can be desirable since such reduction is actually based on samples that predate the report period. The update procedure below appropriately adjusts the internal configuration formats in relation to this new functionality and allows you to select the option on a cell-by-cell basis.

The installation of the I/A Series Report Package version 5.1 resets the Query Offset parameter (parameter Qoff in the rb.ini file shown in Appendix A “Configuration File (.ini file)” to zero. This is the preferred setup. As a result:

- If in version 5.0 Qoff = 0, then the reports do not require updating to run correctly in version 5.1
- If in version 5.0 Qoff = 1, then the reports must be updated as shown in this section in order to run correctly in version 5.1.

Another feature of the update procedure, shown at the end of this section, is the option to hide the configuration sheets in every report file. Note the following regarding this option:

- In version 5.0, the configuration sheet of the report file is not hidden by default
- In version 5.1, the configuration sheet of the report file is hidden by default.

To update reports from version 5.0 to 5.1:

1. Choose **Start > Run > Browse** and navigate to the utility **update_reports_from_5_0_to_5_1.xls**.

   This utility is located under the main Report Package folder. The Run window appears.

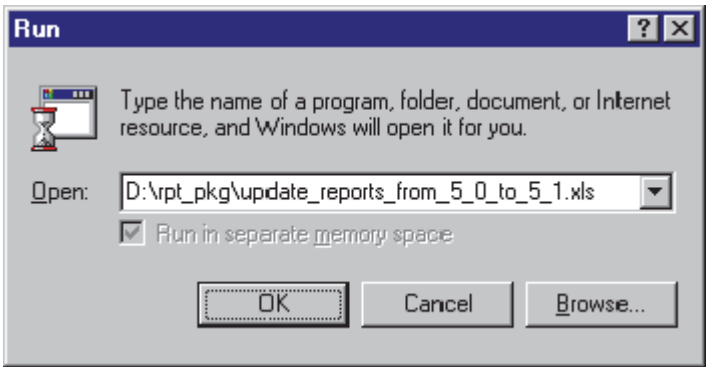


Figure D-1. Update Reports to Version 5.1 Utility Run Window

2. Click **OK**.

   Excel launches and displays the utility shown below.

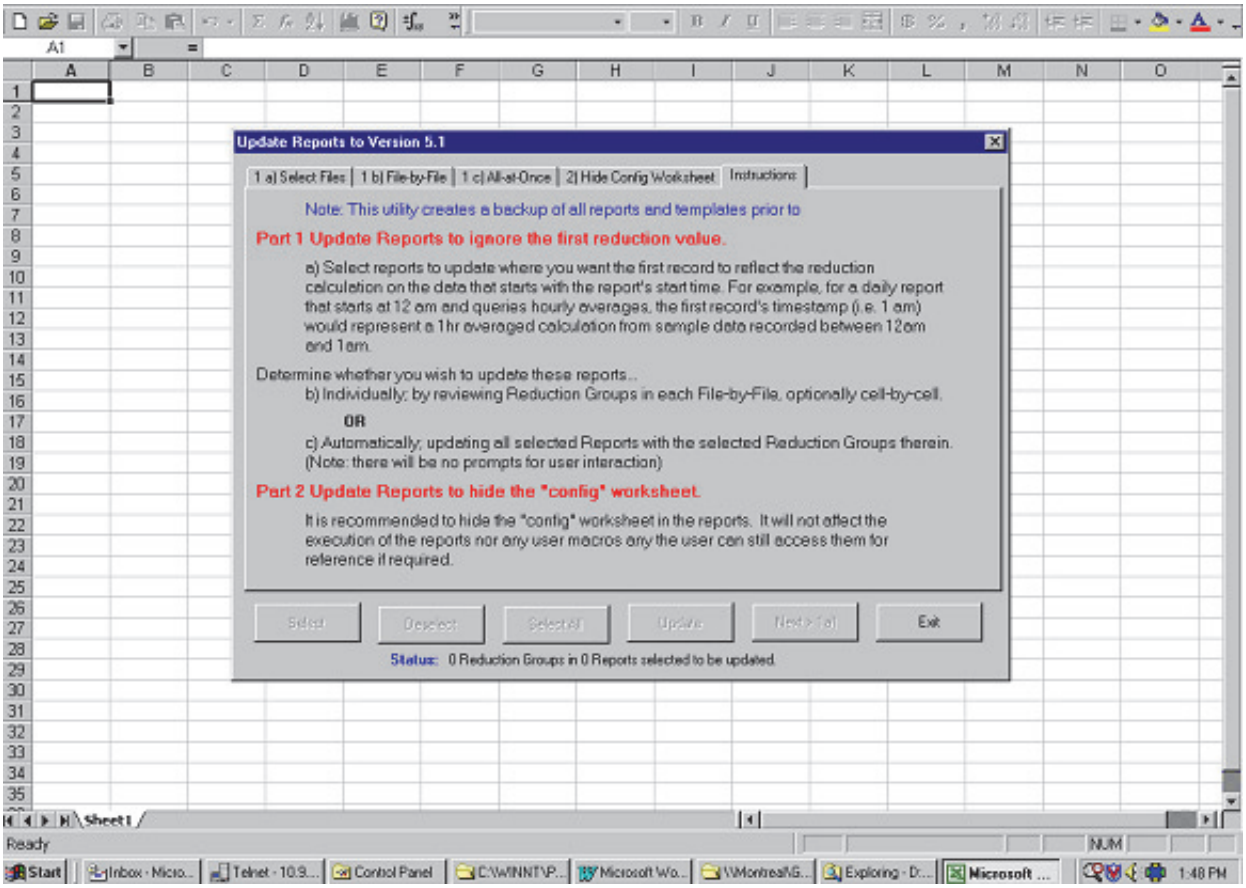


Figure D-2. Update Reports to Version 5.1 Window

3. Select the **Select Files** tab.

   The dialog box shown below appears.

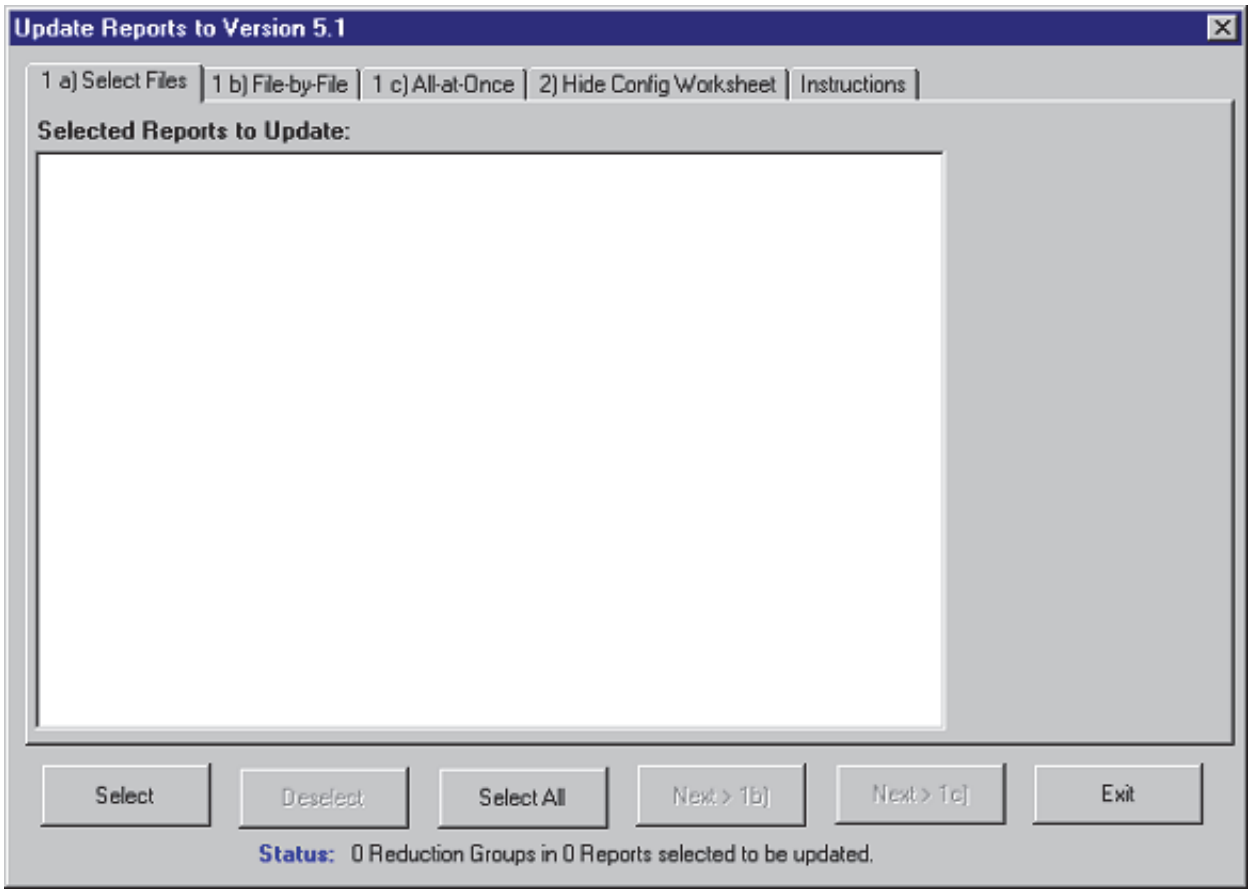


Figure D-3. Select the Reports to Update Window

4. Do one of the following:
   - Click **Select,** then select the .rep files to be updated.
   - Click **Select All** to select all the.rep files.

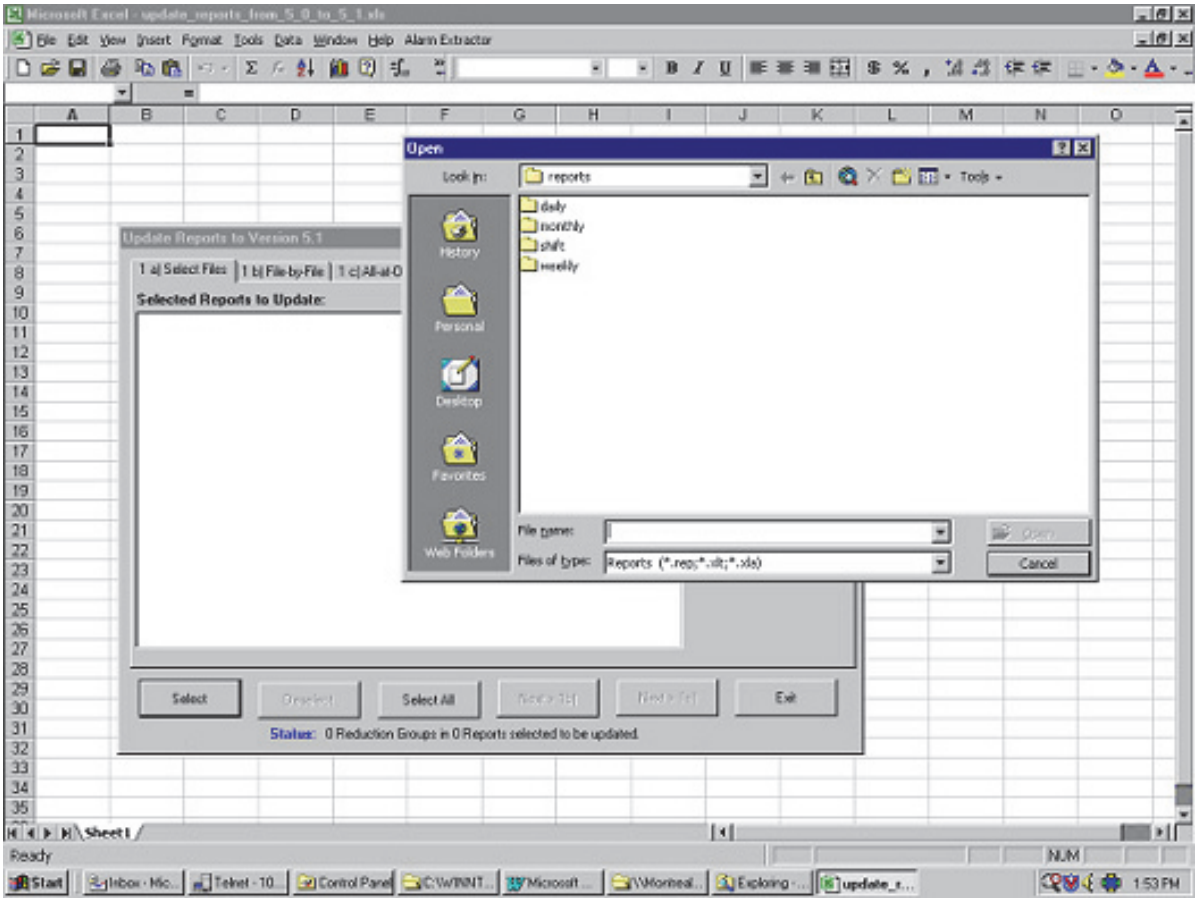


Figure D-4. Select the Reports to Update Window

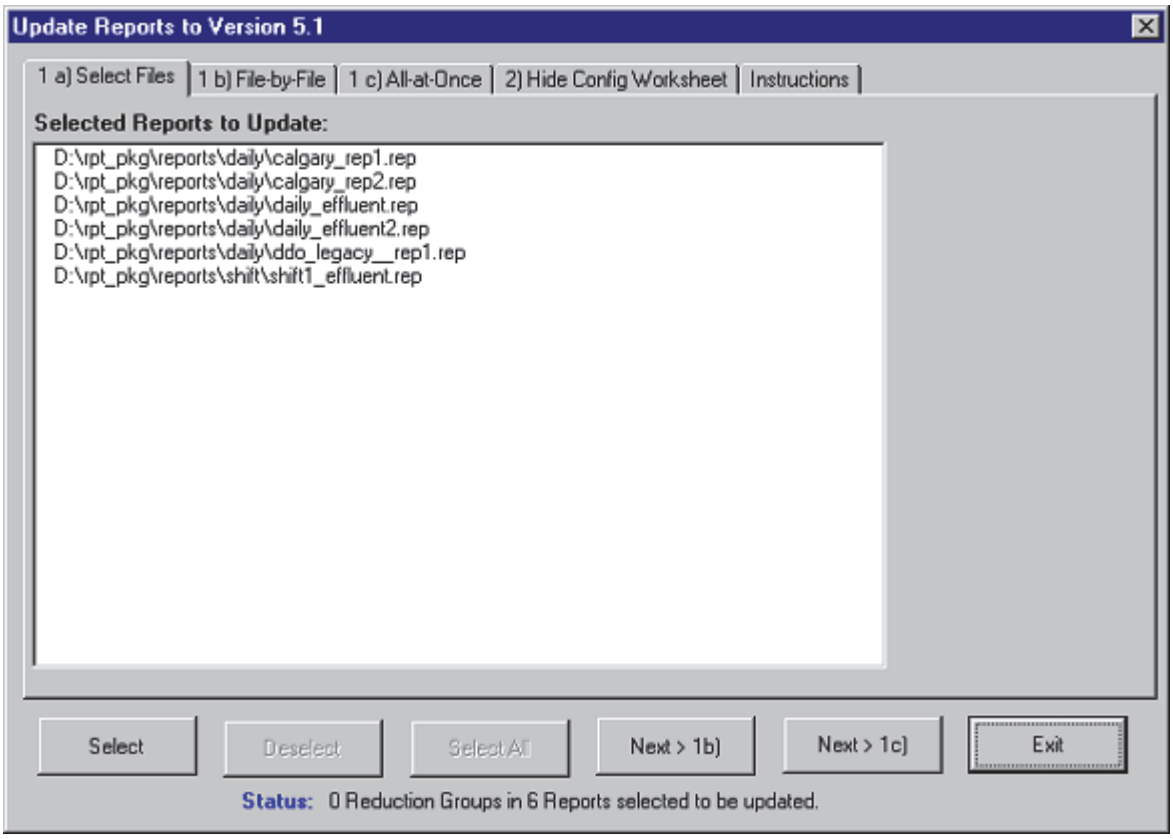


Figure D-5. Select All Reports to Update

5. Do one of the following:

   Select the **File-by-File** tab to update the files individually and click **Update**.

— NOTE

If a report contains links to other workbooks, you may receive the following warning

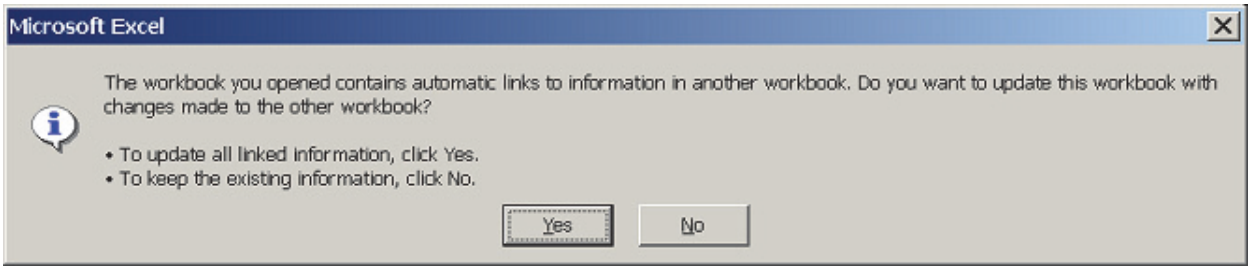


Figure D-6. Automatic Links Warning Dialog

In that case, click No.

It is also possible that you will receive no warning at all, but simply a "File Not Found" box, like the following. In that case, click **Cancel**.

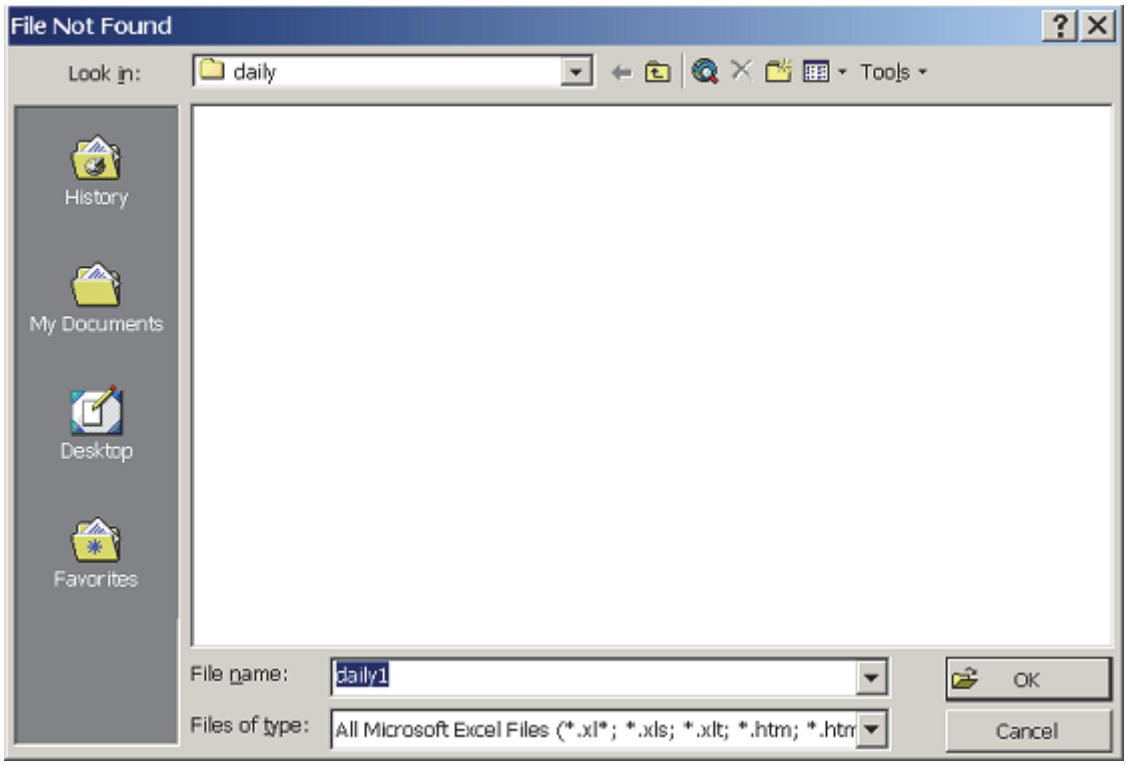


Figure D-7. File Not Found Dialog

- Select the **All-at-Once** tab to update all the files and click **Update.**

.

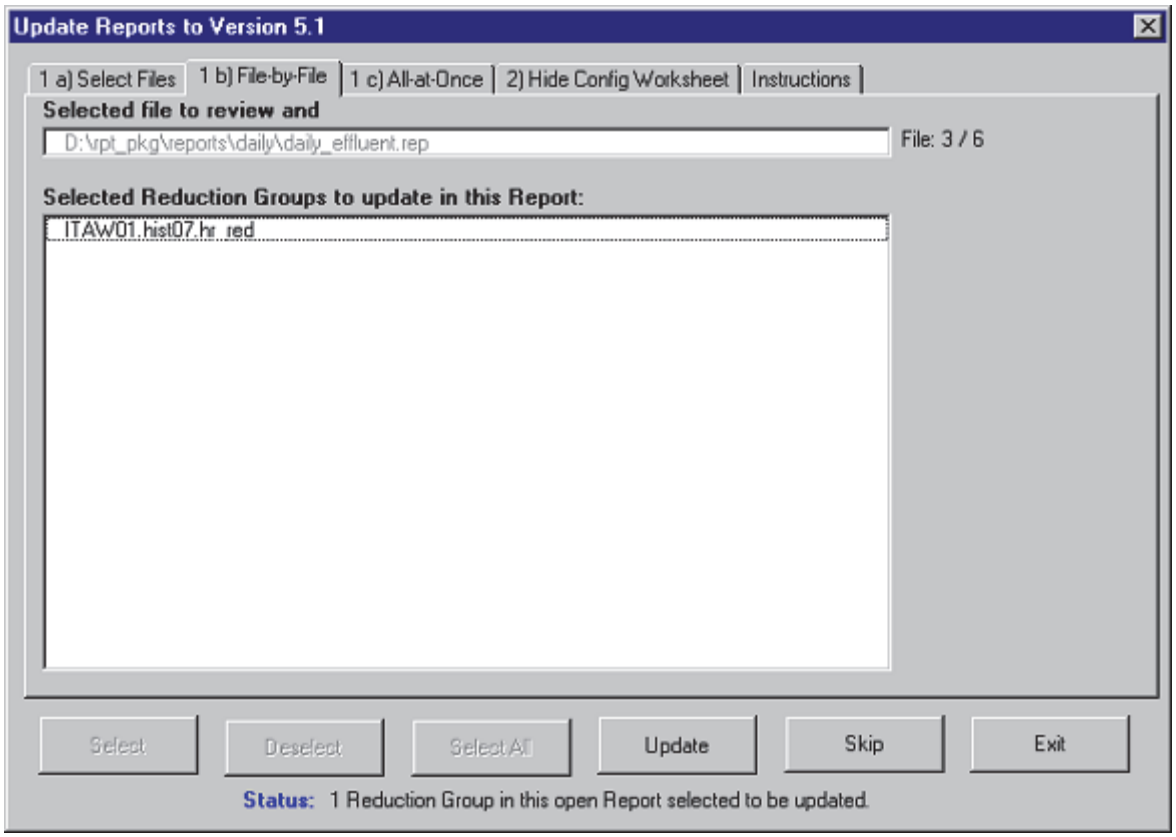


Figure D-8. Reduction Groups to Update Window

6. Click **Update**.

   If you select File-by-File, the dialog boxes shown below open.

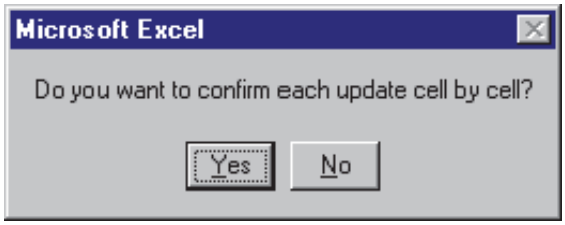


Figure D-9. Cell-by-Cell Confirmation Dialog Box

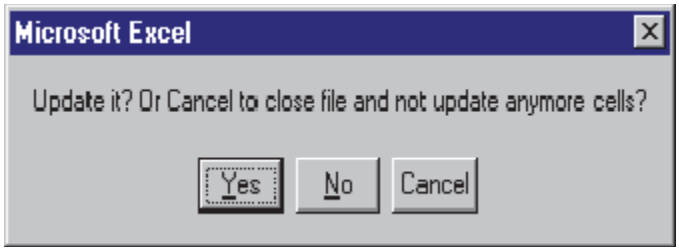


Figure D-10. Cell-by-Cell Update Dialog Box

7. Select the **Hide Worksheet** tab.

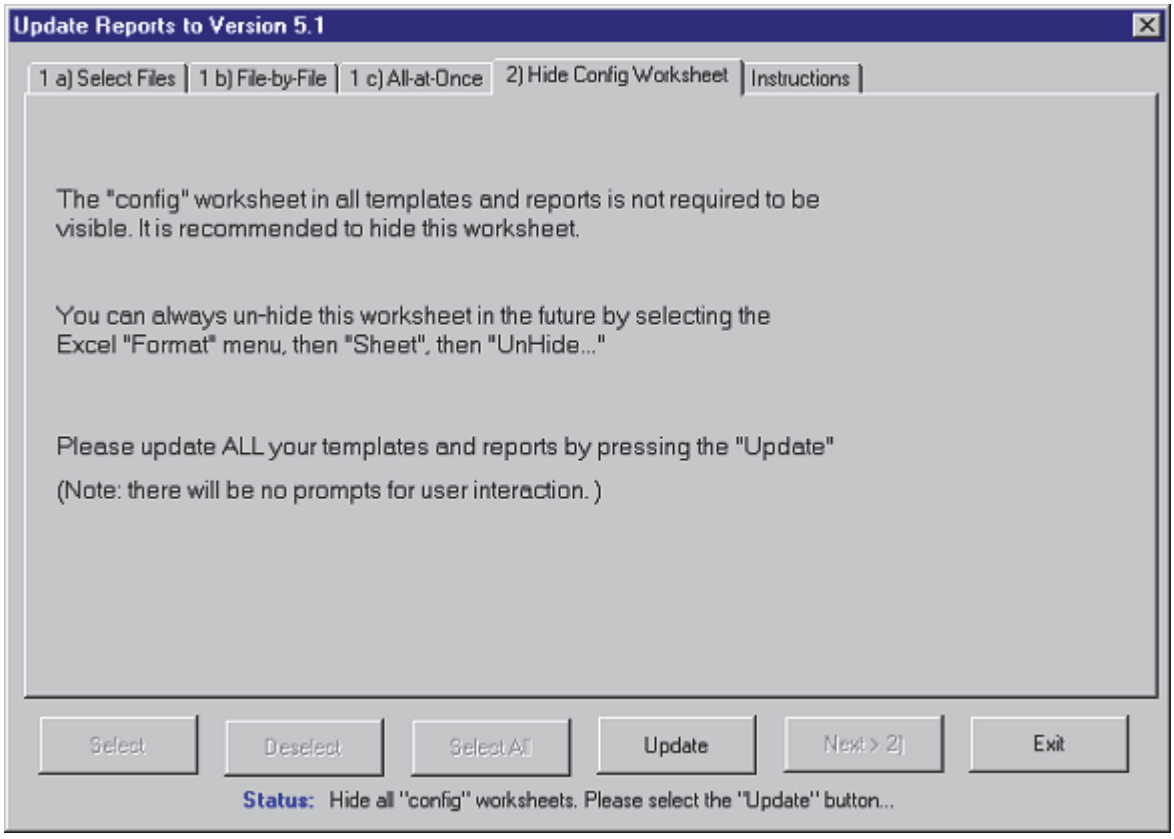


Figure D-11. Hide Config Worksheet Tab

Click **Update** to hide the Config Worksheet in all the reports.

Using Reports Built with WIN32 Report Package

Reports built with WIN32 Report Package can be updated to run on the I/A Series Report Package.

Note the following:

- Reports built using the WIN32 Report Package version 4.3 are structurally at the same level as I/A Series Report Package version 5.0 and hence only require the updating from version 5.0 to 5.1 as described in "Updating Reports from Version 5.0 to Version 5.1" on page 88.
- Reports built using the WIN32 Report Package version 4.2 or earlier must first be updated to version 5.0 as described below and then updated from version 5.0 to version 5.1 as described in "Updating Reports from Version 5.0 to Version 5.1" on page 88.

To update reports to version 5.0:

1. Choose **Start > Run > Browse** and navigate to the utility **update_reports_to_5_0.xls.**

   This utility is located under the main Report Package folder. The Run window shown below appears.

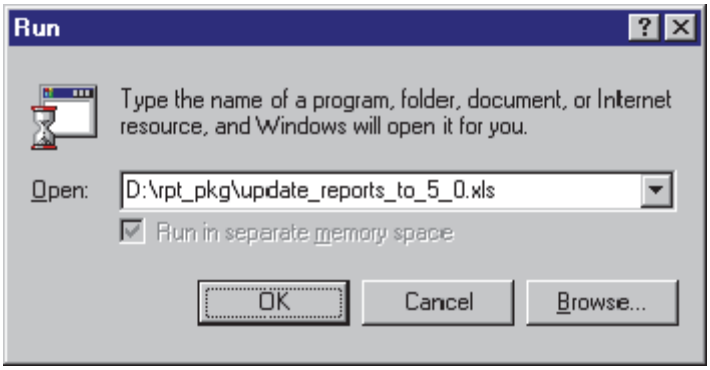


Figure D-12. Update Reports to Version 5.0 Utility Run Window

2. Click **OK**.

   Excel launches and displays the utility shown below.

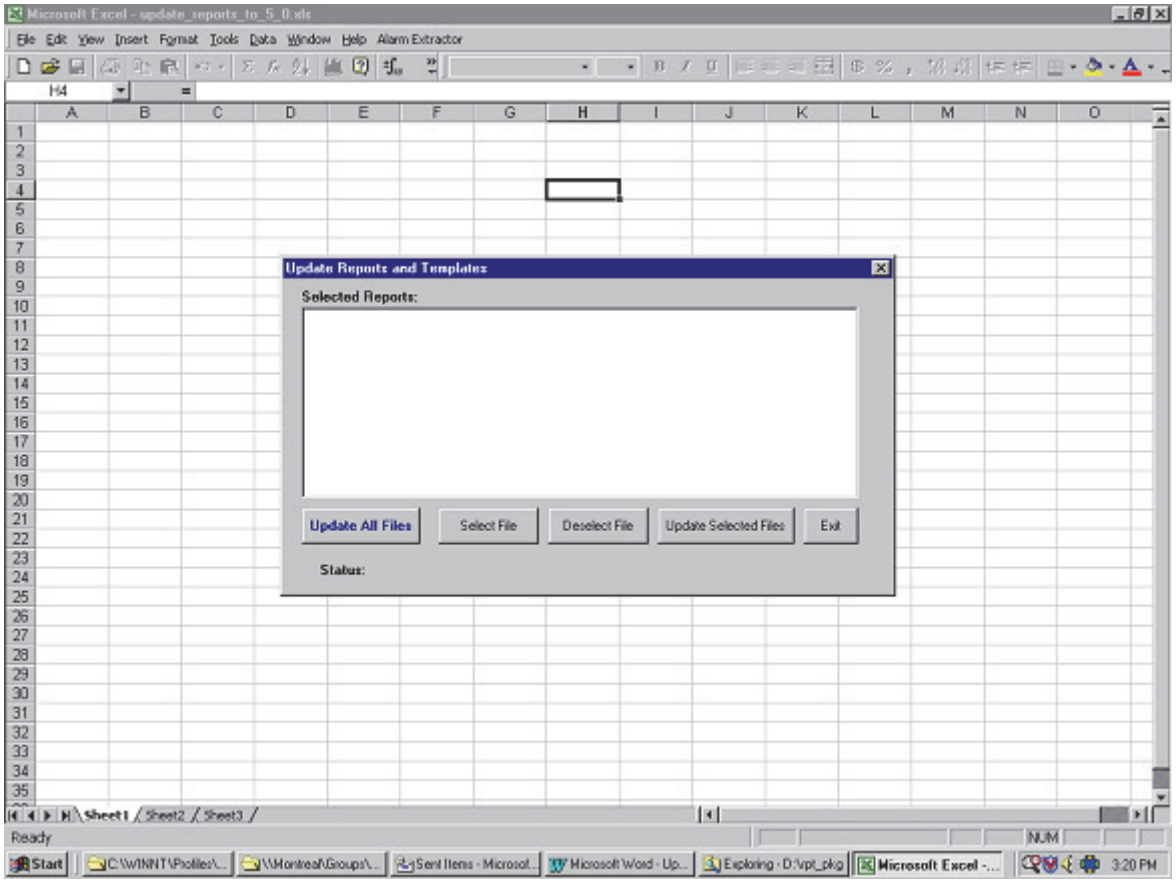


Figure D-13. Update Reports and Template Window

3. Do one of the following:
   - Select **Update All Files** to update all the listed reports.
   - Click **Select File**, select specific reports, and click **Update Selected Files**.

Appendix E. Uninstalling Automize

This appendix provides the procedure for uninstalling Automize software.

To uninstall Automize:

1. Backup the Automize data as described in "Backup / Restore of Automize Data" on page 91.
2. Make sure that the Automize software is not running and that the Automize service is stopped.

   To stop the Automize service:

   - Start the Automize application.
   - Click **Engine** and stop the engine service.
3. Click menu **Engine > NT Service Module > NT Service Module**.

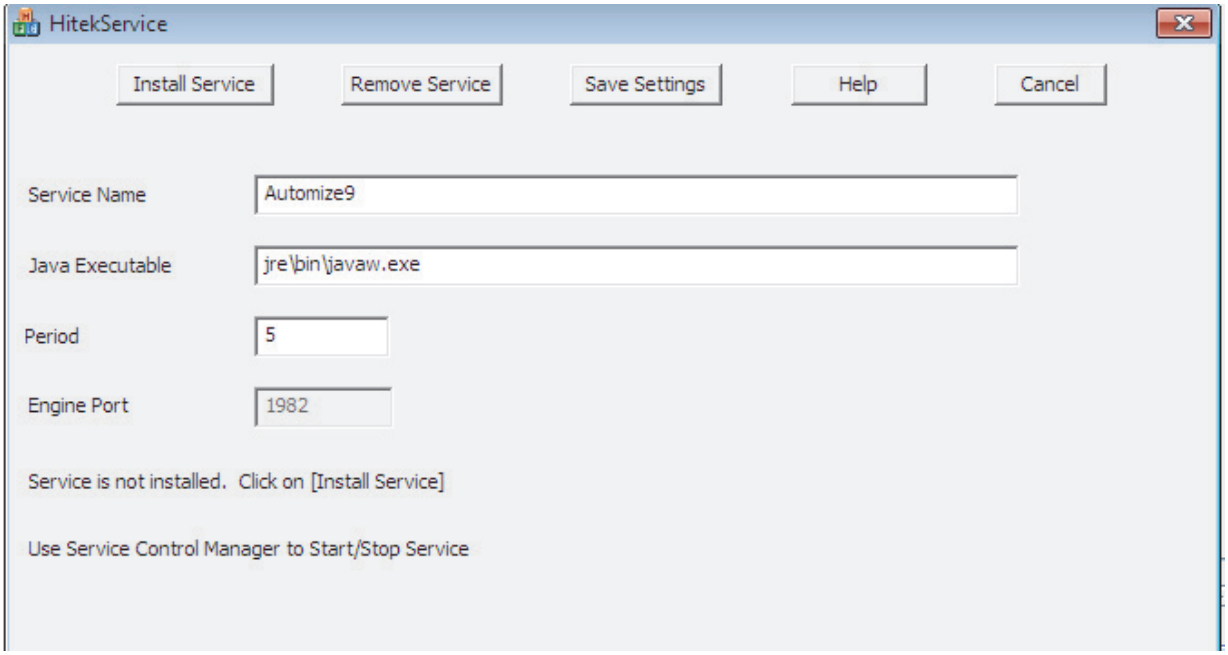


Figure E-1. Automize9 Service Module Dialog Box

4. Click **Remove Service**. This will remove the service from the Service Control Manager. Close the current window by clicking the **Cancel** button.
5. For Windows XP/2003 choose **Start > Settings > Control Panel > Add/Remove Programs**.

   The **Add/Remove Programs Properties** dialog box appears.

   On the **Install/Uninstall** tab, select the Automize9 software and click Add/Remove.
6. For Windows 7 choose **Start > Control Panel > Uninstall a program**.

   The **Uninstall or change a program** dialog box appears.

   In the Name column select the Automize9 software and then click the **Uninstall**.

Appendix F. Backup / Restore of Automize Data

This appendix provides a procedure to backup and restore the Automize data.

This backup and restore procedure can be used when upgrading Automize to a newer version, re-installation of the system or if the installation has to be migrated to another machine.

The Backup function is accessed in the Automize application using **File > Backup settings and logs.**

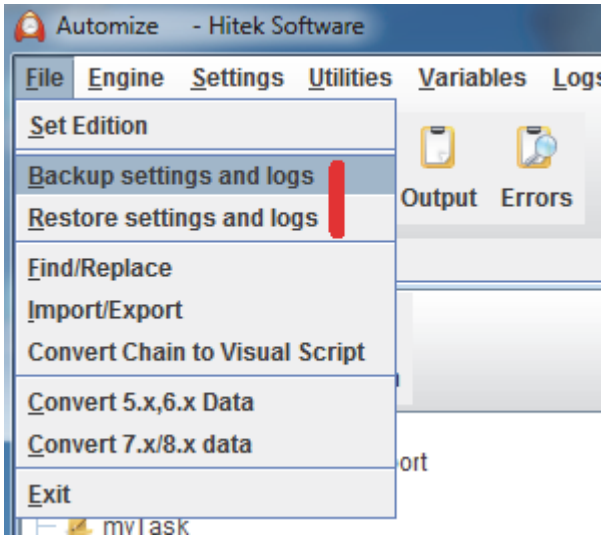


Figure F-1. Automize Backup and Restore Function

Backup of the Automize Data

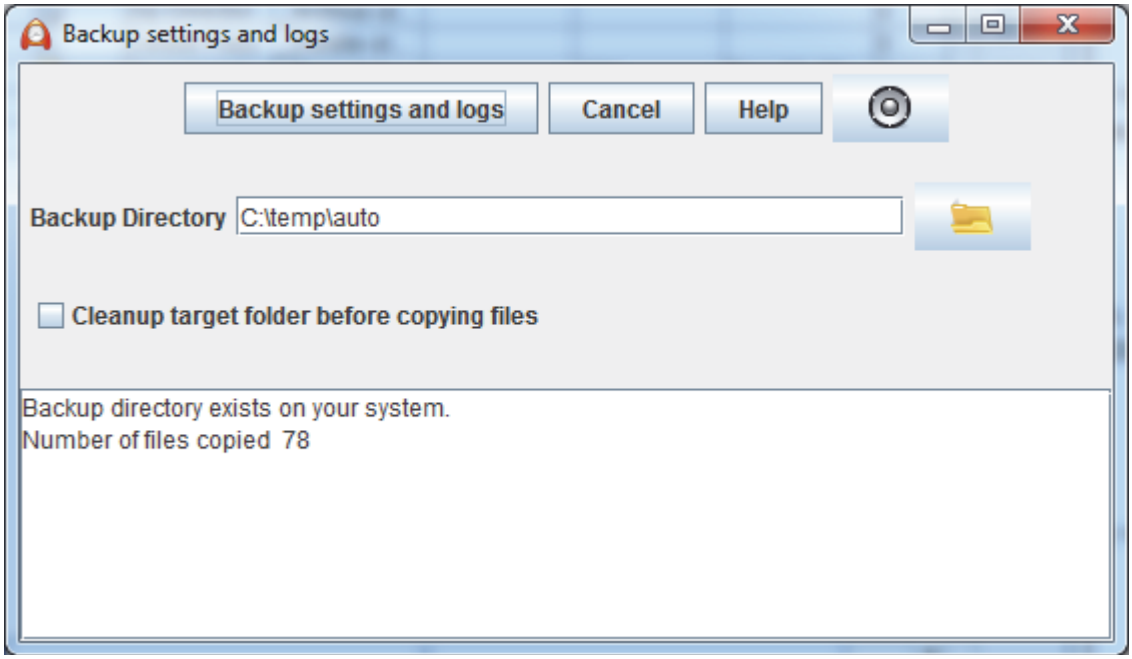


Figure F-2. Automize Backup Settings and Logs

1. Enter a path for the Backup Directory or select it through the folder icon next to the field.
2. Automize will create several sub-folders and files within the specified directory. If an existing folder is chosen then make sure that the folder is empty or alternatively select the check-box "Cleanup target folder before copying files" to automatically delete any content which might be in the specified folder.

   Click **Backup settings and logs**.
3. Automize will show a status message in the text-box at the bottom of the screen once the backup operation is complete.
4. Click **Cancel** to close the window

Restoring of the Automize Data

The Restore function can be accessed in the Automize application using **File > Restore settings and logs.**

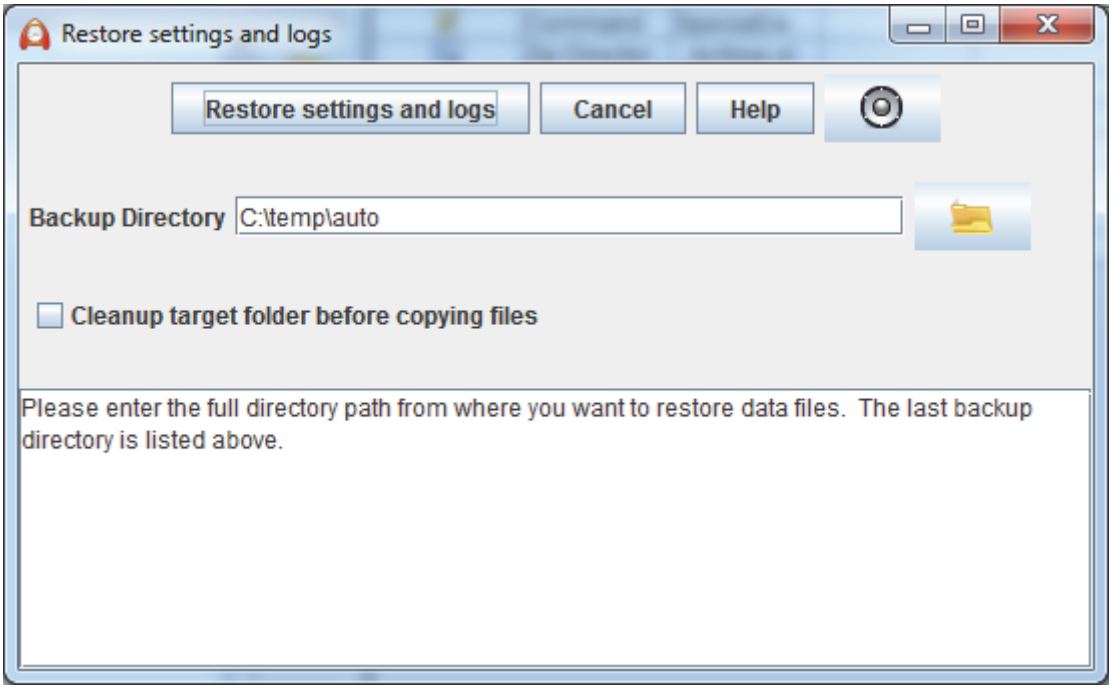


Figure F-3. Automize Restore Settings and Logs

1. Enter the Backup Directory where the backup data is stored or select it through the folder icon next to the field.
2. The check-box "Cleanup target folder before copying files" is a bug of the current version of Automize - it should never be selected at this point.
3. Click **Restore settings and logs**.
4. Automize will show a status message in the text-box at the bottom of the screen once the restore operation is complete.
5. A pop-up window will appear and inform the user that a restart of the software is required for the restored data to be loaded. Click **Yes**.

   Restart Automize and verify that the data has been restored and that the engine is running.

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