Historian Report Configuration
Instruction Guide

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# Document Updates

<table>
<thead>
<tr>
<th>Rev</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Report Software Architecture</td>
<td>Updated the Perl directory Throughout document</td>
</tr>
<tr>
<td>C</td>
<td>Throughout document</td>
<td>Changed Historian Reports and Historian Reports Data install drive to X to indicate that users can select the reports target directory</td>
</tr>
</tbody>
</table>
Safety Symbol Legend

**Warning**

Indicates a procedure or condition that, if not strictly observed, could result in personal injury or death.

**Caution**

Indicates a procedure or condition that, if not strictly observed, could result in damage to or destruction of equipment.

**Attention**

Indicates a procedure or condition that should be strictly followed to improve these applications.
Control System Warnings

**Warning**

To prevent personal injury or damage to equipment, follow all equipment safety procedures, Lockout Tagout (LOTO), and site safety procedures as indicated by Employee Health and Safety (EHS) guidelines.

**Warning**

This equipment contains a potential hazard of electric shock, burn, or death. Only personnel who are adequately trained and thoroughly familiar with the equipment and the instructions should install, operate, or maintain this equipment.

**Warning**

Isolation of test equipment from the equipment under test presents potential electrical hazards. If the test equipment cannot be grounded to the equipment under test, the test equipment’s case must be shielded to prevent contact by personnel. To minimize hazard of electrical shock or burn, approved grounding practices and procedures must be strictly followed.

**Warning**

To prevent personal injury or equipment damage caused by equipment malfunction, only adequately trained personnel should modify any programmable machine.

**Warning**

Always ensure that applicable standards and regulations are followed and only properly certified equipment is used as a critical component of a safety system. Never assume that the Human-machine Interface (HMI) nor the operator will close a safety critical control loop.
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1 Introduction

The Historian Report package is used to generate periodic and on-demand reports from data archived in the Historian. The Historian Report utilizes Perl scripts™ and PI's ODBC interface or Proficy™’s Historian OLE DB interface to query the data from the Historian archives. Reports are formatted for display in the Historian web browser.

The basic report content and layout of the Historian Report are defined and configured in text files. Additionally, you can configure the automatic generation of reports, print, and save to disk options. The current and archived reports can be viewed and printed using the Historian web browser.

2 Report Types and Format

Each report consists of HTML formatted pages containing a table of archived Historian tag values with specified time intervals.

The following configuration items are available to control the format and content of the reports:

- Company name, logo (bitmap that appears in the report title), and logo size
- Report title, background, and style
- Page length and number of data columns
- Start and End time and date
- Time increment
- Historian Tags and Historian Table to use in a report

Reports can be scheduled to print to a disk file and optionally to a printer on an hourly, daily, weekly, monthly, or predefined shift start time basis.

Event-triggered reports can also be configured. The report engine searches the historical event files for the occurrence of a particular digital event transition (high or low). If the event transition is found during the report time period, a report is generated. The data values are listed in the report for the specified tags, from a predefined time before and after the event.

---

Note The historical event files are created by the Alarm server.
3 Report Software Architecture

The following table lists the directories that are created when Historian Report is installed.

**Note** X in the target directory indicates a user-selected location (user can select the target directory during installation).

<table>
<thead>
<tr>
<th>Directories</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C:\Inetpub\scripts\GEDS</td>
<td>Contains Web-related scripts</td>
</tr>
<tr>
<td>C:\Program Files (x86)\Perl</td>
<td>Contains Perl software and Historian Reports</td>
</tr>
<tr>
<td>X:\site\reports</td>
<td>Contains master configuration files for the Reports engine; for example, reports.dat, *.tag, and defaultstyle.css</td>
</tr>
<tr>
<td>X:\site\reports\data</td>
<td>Contains sample report related files and version.dat</td>
</tr>
<tr>
<td>X:\site\reports\doc</td>
<td>Contains reports related documentation</td>
</tr>
<tr>
<td>X:\site\reports\images</td>
<td>Contains image files used in the style sheet. If a customer logo file is specified in the reports.dat file then the logo file must exist in the images folder</td>
</tr>
<tr>
<td>X:\site\reports\log</td>
<td>Contains the rpt.log file if reports are scheduled for automatic generation</td>
</tr>
<tr>
<td>X:\site\reports\scripts</td>
<td>Contains Perl scripts that drive the report package</td>
</tr>
<tr>
<td>X:\hstdata\reports</td>
<td>Contains auto-generated reports. The auto-generated reports are stored in the subdirectories named after the report title</td>
</tr>
</tbody>
</table>
4 Report Configuration

**Note** Historians running ControlST V03.05.00 or higher, that are configured using the WorkstationST* Historian Feature, must use the WorkstationST Component Editor in ToolboxST* to configure reports. For detailed information on configuring reports in ToolboxST, refer to *WorkstationST Historian (GEI-100628)*. The WorkstationST Historian feature creates the Reports.dat and all of the tag files.

All report configurations are defined in the $X:\text{site}\text{reports}$ directory ($C:\text{site}\text{reports}$ on older systems). Only the files in the $X:\text{site}\text{reports}$ directory are modified during report configuration, although you can add image files to the $X:\text{site}\text{reports}\text{images}$ directory to customize the report’s appearance.

The $X:\text{site}\text{reports}$ directory must contain the following files:

- Reports.dat – master configuration file and a list of all report definitions.
- *.tag files – Historian tag names to include in the reports. Each defined report in reports.dat identifies a particular tag file to use.
- defaultstyle.css – cascading style sheet to define an HTML page style for a report. You can modify and/or add a new file to customize the appearance of a report.

**Note** $X$ in the target directory path indicates a user-selected target directory location (install allows the user to select the target directory).

4.1 Reports.dat File

The reports.dat file contains the default report properties configuration and the individual report definitions, and is located in $X:\text{site}\text{reports}$. It is self-documenting and contains a list of all available configuration items at the beginning of the file. A semicolon (;) is used to disable a particular item in a report definition and to specify comments.

**Note** Use the Historian web browser to make sure the report displays the correct information. There is no error checking performed on the report configuration and certain items defined during report configuration may interfere with other options.

The following sample reports.dat file is provided with instructional comments. The instructional comments are denoted using ;—> ’and are in italics’. The beginning of the file contains a series of comments that list all available configuration properties with descriptions.

A report definition consists of assigning an identification number (id = ##) first, then entering additional properties as needed to complete the definition. Each configuration property is entered on its own line, followed by the = sign, and then by the property value.
id = unique identifier number

title = report title, printed at top of each page, displayed in report list

table = the SQL table to query, this file uses the PI SQL table names listed below. When the target historian is Proficy the Historian Report converts the table names to the appropriate CalculationMode table name.

piinterp - current values – (converted to interpolated for Proficy)

piavg - time weighted average – (converted to average for Proficy)

pimin - minimum value – (converted to minimum for Proficy)

pimax - maximum value – (converted to maximum for Proficy)

pistd - standard deviation – (converted to standarddeviation for Proficy)

piTotal - time based total – (converted to total for Proficy)

See the PI ODBC manual for more information on the PI SQL tables

Use Proficy’s Historian Electronic Book for more information on Calculation Modes

time_step = the increment to use for the report, there will be one row for each time step

<integer>{s|m|h|d}

e.g.

30s - thirty seconds

1m - one minute

8h - eight hours

1d - one day

tagfile = file containing the PI tags to include in the report

startdate = the beginning date for the report

today

yesterday

mm/dd/yyyy

enddate = the ending date for the report

starttime = the beginning time for the report

hh:mm

endtime = the ending time for the report
*shiftstarttimes* = list of up to 12 shift start times for a day

- hh:mm,hh:mm,hh:mm

- e.g.

- 07:00,15:00,23:00

- 01:00,05:00,10:00,15:00,21:00

*type* = report type; only used for shift or daily reports

- {shift|daily}

- a shift report will use 00:00,08:00,16:00 as the shift start times if

- the parameter shiftstarttimes is not defined

- a daily report always starts and ends at 00:00

*datacolumns* = number of data columns in the data tables

*pagelength* = length of page in lines

*frequency* = how often to automatically generate this report

- <integer>{m|h|d}

- e.g.

- 3m - every three months (quarterly)

- 8h - every eight hours

- 7d - every 7 days (weekly)

- Note: do not use with shift report (type = shift)

*style_sheet* = cascading style sheet

*company_logo* = graphical image to display at the top of the title page

*company_logo_align* = align image to right or left of company_logo_text

- left

- right

*company_logo_width* = adjusts the width of the company_logo

- <integer> - the number of pixels

- -1 - use actual width

*company_logo_height* = adjusts the height of the company_logo

- <integer> - the number of pixels

- -1 - use actual height

*company_logo_text* = "none" or text to display at the top of the title page
; * event_trigger1 = event or SOE to search for in the digital exception database
; required for an event triggered search
; <unit name>, <tag name>, <edge>
; The <edge> is either + (plus) or - (minus)
; + (plus) looks for the value to change from false (0) to true (1)
; - (minus) looks for the value to change from true (1) to false (0)
; * event_level1 = logic value in the Historian to search for at the time of the trigger
; optional for an event triggered search
; <unit name>, <tag name>, <level>
; The <level> is either 0 (false) or 1 (true)
; * event_trigger2 = event or SOE to search for in the digital exception database
; optional for an event triggered search
; * event_level2 = logic value in the PI historian to search for at the time of the trigger
; optional for an event triggered search
; * time_before_event = delta time before event to start data analysis
; ddd hh:mm:ss
; * time_after_event = delta time after event to stop data analysis
; ddd hh:mm:ss
; * alarm_server_host = host name or IP address that has the WorkstationST Alarm
; Server - used for finding events in event triggered reports
; * storage_time = the number of days the report is to remain on the disk before being deleted
; * print_on_creation = print to Historian web browser's default printer
; no
; yes
;
; make sure the id parameter is first!!
; --> make sure each new report definition begins with the id parameter

; --> this is the beginning of the report definition
; --> id=default - this section identifies ‘common’ parameters to be used by all reports
; --> these items will be used unless redefined under a particular report id
Sample report parameters

id=default

title=Report

table=piinterp

; --> this is the 'default' style sheet definition. This file is in X:\site\reports

style_sheet=defaultstyle.css

; --> the report background defined in this file

; --> default uses a Windows NT background image

company_logo_text=ABC Power Company

; --> to customize, the user can place their own file in X:\site\reports\images

company_logo=ABCPowerLogo.bmp

company_logo_align=left

company_logo_width=-1

company_logo_height=-1

startdate=yesterday

enddate=today

; --> define up to 12 the shift start times

shiftstarttimes=07:00,15:00,23:00

time_step=1h

pagelength=68

datacolumns=7

; --> define where the WorkstationST Alarm Server is located

alarm_server_host=localhost

storage_time=30

print_on_creation=no

; --> begin a report definition; id does not need to start at 01, but all id's must be unique

; --> if more than 100 reports are created use three digits to represent the ID (ex. 001)
id=01

; --> defines the title displayed on the report

title=G1 Exhaust Shift Report

; --> this is a 'shift' report; it uses shift times defined in the default report.

type=shift

; --> use interpolated values for this report

table =piinterp

; --> defines the file that contains the list of tag (variable) names to retrieve for the report.
tagfile=G1_Exhaust.tag

; --> show data in 15 minute steps in the report period
time_step =15m

; --> number of columns of data to display on the report

; --> used to 'fit' data to screen or printer
datacolumns=7

pagelength=50

; --> start new report definition

id=11

title= G1 MW Hour Totals Hourly Report

; --> different set of points in this report
tagfile =MW_HourTotals.tag

table =piinterp

; --> show data in 5 min step
time_step =5m

; --> automatically generate report every hour

frequency=1h

pagelength=50
id=20

title= G1 Fuel Flow Totals Daily Report
tagfile =FuelFlowTotals.tag

; --> use the average table values for this report
table =piavg

; --> show data in 1 hour steps
time_step =1h

; --> automatically generate report every day
frequency=1d

; --> this will automatically print the report when it is generated
print_on_creation=yes

pagelength=50

id=21

title= G1 MW Hour Totals Daily Report
tagfile =MW_HourTotals.tag

table =piavg
time_step =1h

frequency=1d

id=40

title= G1 Fuel Flow Totals Weekly Report
tagfile =FuelFlowTotals.tag

table =piavg

; --> show data in 1 day steps
time_step =1d

; --> automatically generate report every 7 days (week)
frequency=7d
id=41
title= G1 MW Hour Totals Weekly Report
tagfile =MW_HourTotals.tag
table =piavg
time_step =1d
frequency=7d
startdate = 01/01/2001
denddate =today

id=60
title= G1 Fuel Flow Totals Monthly Report
tagfile =FuelFlowTotals.tag
table =piavg
; --> show data in 1 week increments
time_step =7d
; --> automatically generate report every month
frequency=1m
startdate = 01/01/2001
denddate =today

id=61
title= G1 MW Hour Totals Monthly Report
tagfile =MW_HourTotals.tag
table =piavg
time_step =7d
frequency=1m
startdate = 01/01/2001
denddate =today
id=99

title=Base Load Event Report
table=piinterp
tagfile=baseload.tag

; —> automatically generate report every hour
frequency=1h

; —> show data in 1 minute increments
time_step=1m

pagelength=40

; —> enter the first trigger to look for – G1.L83B transition high
event_trigger1=G1,L83B,+ 

; —> enter an additional permissive – G1.L52GX in high state
event_level1=G1,L52GX,1

; —> optional, enter additional trigger to look for – G1.L83B transition off
event_trigger2=G1,L83B,-

; —> when trigger and permissive are present then

; —> report data 5 minutes before trigger and 15 minutes after (at 1 min intervals, above)
time_before_event=0000 00:05:00

 time_after_event=0000 00:15:00
4.2 HistorianReports.cfg file

The HistorianReports.cfg is a text file used by the Perl report scripts to determine the type of historian the reporting system is accessing. By default, the file is located in the common programs application data location (for example C:\ProgramData\GE Energy\Historian Reports). The HistorianReports.cfg file contains the details of a historian type, historian connection string, application locations, and target directories. Based on the selection of either PI or Proficy during the Historian Reports installation, the appropriate HistorianReports.cfg file is installed. An example of each file follows.

---

**Warning**

Do not change the contents of this file unless directed to by a qualified GE representative.

---

**Note** A semicolon (;) is used to disable any lines and to specify comments.

**PI Definitions:**

- trigfind_hst Location of Trigfind.exe
- trigfind_wst Location of triggerfind.exe
- report_dir Windows path for auto generated reports
- report_url URL of the report directory
- report_source Master configuration directory for the reports
- CSS_Path URL of CSS files
- Image_Path URL of Image files
- TagFileDir Windows directory containing tag files
- LogDir Windows directory for log files
- ScriptDir Windows directory for master Perl script files
- UserScriptDir Windows directory for user generated script files
- CustomScriptDir Windows directory for user generated Custom script file.
- UserCustomScriptDir Windows directory for user generated Custom Perl script file.
- HistorianType This entry controls the type of the historian the reporting system is accessing and which connection string to use (OSIPIConnectString or GEFanucConnectString).
- OSIPIConnectString The ODBC connection string for OSIPI that uses the following format:

  DSN=[DSN Name];UID=[User ID];PWD=[Password];

- OSIPICustomTagListQuery The SQL query for selecting the custom tags.
- OPCDASERVERID This is the server ID
- DebugMode This is used to turn the debug mode on or off

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*Public Information*
**Proficy Definitions:**

- **trigfind_hst**: Location of Trigfind.exe
- **trigfind_wst**: Location of Triggerfind.exe
- **report_dir**: Windows path for auto generated reports
- **report_url**: URL of the report directory
- **report_source**: Master configuration directory for the reports
- **CSS_Path**: URL of CSS files
- **Image_Path**: URL of Image files
- **TagFileDir**: Windows directory containing tag files
- **LogDir**: Windows directory for log files
- **ScriptDir**: Windows directory for master Perl script files
- **UserScriptDir**: Windows directory for user generated script files
- **CustomScriptDir**: Windows directory for Custom Script files
- **HistorianType**: This entry controls the type of the historian the reporting system is accessing (OSIPIConnectString or GEFanucConnectString)
- **GEFanucConnectString**: The OLE DB connection string for Proficy Historian that uses the following format:

  Provider=IHOLED.B.Historian.1;Persist Security Info=False;
  USER ID=[Username];
  Password=[Password];Data Source=[Target];Mode=Read;

- **GEFanucCustomTagListQuery**: The SQL query for selecting the custom tags
- **OPCHDASERVERID**: This is the server ID
- **DebugMode**: This is used to turn the debug mode on or off

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**Note**: All items in brackets [ ] are placeholders
4.3 Tag Files

Tag files are text files that contain a list of the Historian tags to be retrieved. By default, tag files are located in $X:\site\reports$. The filename must match the name specified for the tagfile property in the reports.dat file. The first line of the file is ignored, and is used to identify the file contents (usually the same as the file name). You can easily add and/or remove points from a report by modifying the associated tag file. The following is a sample file (G1_exhaust.tag):

G1 Exhaust Tags
G1.DWATT
G1.AFPAP
G1.TTXD1_1
G1.TTXD1_2
G1.TTXD1_3
G1.TTXD1_4
G1.TTXD1_5
G1.TTXD1_6
G1.TTXD1_7
G1.TTXD1_8
G1.TTXD1_9
G1.TTXD1_10
G1.TTXD1_11
G1.TTXD1_12
G1.TTXD1_13
G1.TTXD1_14
G1.TTXD1_15
G1.TTXD1_16
G1.TTXD1_17
G1.TTXD1_18
G1.TTXD1_19
G1.TTXD1_20
G1.TTXD1_21
G1.TTXD1_22
G1.TTXD1_23
G1.TTXD1_24
G1.TTXD1_25
G1.TTXD1_26
G1.TTXD1_27
G1.TTXM
G1.TTXSP1
G1.TTXSP2
G1.TTXSP3
G1.TTXSPL

**Note** The WorkstationST Historian uses a period (.) as a separator between the device name and the tag name when tags are configured in the Historian to create a fully qualified name (G1.TTXD1_1). The HST-based Historian uses a colon (:) as a separator between the device name and the tag name when tags are configured in the Historian to create a fully qualified name (G1:TTXD1_1).
5 Automatic Report Generation

Note All reports generated by the system can be accessed using the Historian web browser.

Automatic report generation can be configured to specify a frequency in the report definition (frequency =); or, define a shift report (type=shift). It can also be scheduled to start automatically at your convenience on a daily or hourly basis, using the Windows Task Scheduler Service.

Note The GUI interface can also be used to find additional information about each task, such as last run task and completion status.

➢➢ To verify the service is running or to view current scheduled tasks: open the Windows Schedule Task dialog box.

• On Windows 2012 R2 and above, search for Task Scheduler from the Windows search box.
• On Windows 10, search for Schedule Tasks from the Windows Settings dialog box.
• On Windows versions prior to Windows 10, open the Schedule Tasks dialog box from Control Panel/Administrative Tools.

➢➢ To load the tasks into the scheduler

Note Log on to an account that has Administrator privileges to run the scheduling scripts.

1. From the Start menu, select All Programs, Accessories, and Command Prompt to display the command prompt window.

   Enter \cd/d \X:\site\reports\scripts\ and press Enter.

   ![Command Prompt window]

   Note X in the target directory indicates a user-selected location (user can select the target directory during installation).

   Note On a SecurityST hardened computer, right-click on Command Prompt and select Run as administrator.
2. Enter `start_at.pl` and press `Enter`.

One task is created that runs on the hour (`HistorianReports`).

![Command Prompt Output]

**Note** A script can also be used to schedule the required tasks (`X:\site\reports\scripts`).
➢ To configure the HistorianReports scheduled task’s security option

1. Open the Windows Schedule Tasks dialog box as follows:
   - On Windows 2012 R2 and above, search for Task Scheduler from the Windows search box.
   - On Windows 10, search for Schedule Tasks from the Windows Settings dialog box.
   - On Windows versions prior to Windows 10, open the Schedule Tasks dialog box from Control Panel/Administrative Tools.

2. Set the Security Options as follows:

   From the **Tree View**, select **Task Scheduler Library**.

   The list of scheduled tasks displays.

   Right-click the **HistorianReports** scheduled task and select **Properties**.

   The **HistorianReports Properties** window displays.

   From the **General** tab, under **Security options**, select **Run whether user is logged on or not**.

   Select the check box **Do not store password**. The task will only have access to local computer resources.

   Click **OK** to save changes.

   The HistorianReports task is now scheduled to run every hour (1:00, 2:00, and such).

   **Note** Do this only once on a system. After the command line is entered, the scheduler will automatically start the commands at the scheduled time.

3. From the **Task Scheduler File** menu, select **Exit**.
To un-schedule a task: from the directory X:\site\reports\scripts, enter stop_at.pl and press Enter.

The reports generated by the task scheduler are saved in the X:\hstdata\reports directory. A subdirectory, with the same report title name is created for each automatic report generated by the system. Under each report directory, reports are created with a filename containing the date and time of the report (for example, 20030116_0800.htm indicates the report was generated at 08:00AM, Jan 16, 2003). The status of the report generation is recorded in X:\site\reports\LOG\rpt.log.

Note X in the target directory indicates a user-selected location (user can select the target directory during installation).
6 Web Browser Interface

The Historian web browser is used to display the configured reports. A default home page is installed as a part of the report.

➢➢ To display Historian reports in a web browser: go to the Historian Home Page at http://localhost/.

Tip Reports can be printed using the File, Print command or include the print_on_creation option in the reports.dat file. Including this option in the reports.dat file automatically prints a report when a report is generated.
Note Each directory name is the same as the configured report title.
6.1 Custom Reports

➢ To create a custom report

Select the required options using the drop-down boxes to customize the report.

Use the Ctrl and Shift keys to select multiple points.

Click to submit a report.

The report displays in the Historian web browser.

**Note**  The custom report is generated once on demand. If you are continuously generating the same report using the custom report window, and if you want the report to be available in the system, then a tag file must be created and the parameters must be entered into the reports.dat file.
Report Errors

Errors in the Historian Report can occur due to incorrect report configuration or automatic report generation. When a report is started and report configuration errors occur, the errors can be viewed in the Historian web browser. Errors can be caused by:

- **Improper visual properties** If an error occurs, make sure the visual properties of the report are accurate. Visual properties of the report are controlled by defaultstyle.css. By default, defaultstyle.css is located in $X:\site\reports\defaultstyle.css$. It contains various font types, sizes, colors, default background colors, and bitmaps. Also, make sure that the background image files referenced in the defaultstyle.css file are located in the $X:\site\reports\images$ directory, and the logo image for the report titles specified in the reports.dat file is located in $X:\site\reports\images$.

  **Note** $X$ in the target directory indicates a user-selected location (user can select the target directory during installation).

- **Incorrect report parameters** Even though there are errors in the report configuration, you can process the report, but the data displays incorrectly. To generate the correct data, record the desired corrections and adjust the report parameters available in $X:\site\reports\reports.dat$. For these type errors, make sure that the start and/or stop times, increment, frequency, or event triggers are configured properly.

- **Incorrect point name in the tag file** This type of error displays a message similar to the following:

  Error executing query: OLE exception from "Microsoft® OLE DB Provider for ODBC Drivers": [OSI][PI-ODBC][PI]Tag < G1.AFPAF > not found Win32::OLE(0.15) error 0x80004005: "Unspecified error" in METHOD/PROPERTYGET "Execute" SELECT tag, descriptor, engunits, pointtype FROM pipoint WHERE tag = 'G1.DWATT' or tag = 'G1.AFPAF' or tag = 'G1.MVARHR' or tag = 'G1.MWATTHR'

  This message is generally a copy of the SQL command script that is trying to execute to get the data, along with the returned error message. The error message indicates G1.AFPAF was not found. To resolve this error, enter the correct point name (G1.AFPAF) in the tag file.

Automatic report generation errors are related to scheduler problems. Make sure that the chain.pl task is scheduled to run every hour.

➢➢➢ To verify and view the current scheduled tasks: open the Windows Schedule Task dialog box.

- On Windows 2012 R2 and above, search for Task Scheduler from the Windows search box.
- On Windows 10, search for Schedule Tasks from the Windows Settings dialog box.
- On Windows versions prior to Windows 10, open the Schedule Tasks dialog box from Control Panel/Administrative Tools.

  **Note** The GUI interface can also be used to find additional information about each task, such as last run task, completion status, and so on.

A rpt.log file is created whenever a task runs (every hour). Any error messages or successful completion messages are logged to the rpt.log file. By default, you can view the log file in $X:\site\reports\LOG\rpt.log$. 