Historian Report Post-installation
Instruction Guide

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## Document Updates

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1 Introduction

After the initial installation of the Historian Report package, the following procedures must be completed to use the report package.

**Attention**

Perform these procedures only after the initial Historian Report installation is complete.

- Verify Proficy* Historian OLE DB installation (Proficy Historian only)
- Verify PI ODBC installation (PI Historian only)
- Add ODBC Data Source (PI Historian only)
- Verify PI SQL Subsystem configuration (PI Historian only)
- Configure a Web Browser

**Note** Internet Information Services (IIS 7) does not require any further configuration for workstations with Windows 7 and later and Windows Server 2008 R2 and later.

2 Proficy Historian OLE DB Installation (Proficy Historian Only)

Proficy Historian OLE DB should have been installed during the initial installation of Proficy Historian. If this component is not installed, refer to the Proficy Historian with ControlST Software Suite System Guide (GEH-6745) for installation instructions.

3 PI ODBC Installation (PI Historian only)

PI ODBC should have been installed during the initial installation of PI Historian. If this component is not installed, refer to the PI Historian with ControlST Software Suite System Guide (GEH-6744) for installation instructions.
4 Add ODBC Data Source (PI Historian Only)

The default ODBC Data Source Administrator is for 64-bit data sources only. PI ODBC is a 32-bit data source and must be configured with the 32-bit ODBC Data Source Administrator.

All Windows Server 2008 R2 and later have 64-bit operating systems. The 32-bit ODBC Data Source Administrator is typically located in \Windows\SysWOW64\odbcad32.exe.

4.1 PI 2018 SP3 Systems

➢➢ To add the ODBC data source on PI 2018 SP3 Systems with Windows Server 2008 R2 or later

1. Go to C:\Windows\SysWOW64.
2. Right-click on odbcad32.exe and select Run as administrator.
3. In the ODBC Data Source Administrator (32-bit) window, select the System DSN tab.
4. On the System DSN tab, click Add.
5. In the Create New Data Source dialog, scroll down and select PI ODBC Driver, then click Finish.
6. In the PI ODBC DSN Setup dialog:
   a. In the ODBC Data Source Name field, enter PI.
   b. In the ODBC Data Source Description field, enter PI System Data Source.
   c. In the PI SQL Data Access Server Name field, enter the Historian Server name.
   d. Select (check) the Trusted connection check box.
   e. On the Data Source tab:
      i. In the Type field, select PI OLEDB Provider from the drop-down list.
      ii. In the PI Data Archive field, enter the PI Historian Server name.
      iii. In the Initial catalog field, accept the default (blank).
      iv. In the Options field, accept the default (Integrated Security=SSPI).
f. Click **Test Connection**. You should get a **Test connection succeeded dialog** message. Click **OK**.

g. Click **OK** to close the **PI ODBC DSN Setup** dialog.

7. In the **ODBC Data Source Administrator (32-bit)** window, click **Apply**, then click **OK**.

### 4.2 PI 2015 Systems

➢➢ **To add the ODBC data source on PI 2015 Systems with Windows Server 2008 R2 or later**

1. Go to `C:\Windows\SysWOW64`.

2. Right-click on `odbcad32.exe` and select **Run as administrator**.

3. In the **ODBC Data Source Administrator (32-bit)** window, select the **System DSN** tab.

4. On the **System DSN** tab, click **Add**.

5. In the **Create New Data Source** dialog, scroll down and select **PI ODBC Driver**, then click **Finish**.

6. In the **PI ODBC Data Source Setup** dialog:
   a. In the **Data Source Name** field, enter **PI**.
   b. In the **Description** field, enter **PI System Data Source**.
   c. In the **PI Server** section:
      i. In the **Name** field, select the PI Historian Server.
      ii. The **Port** field should be **5450**.
      iii. Uncheck the **Perform explicit login using PI username and password** check box.
   d. In the **Integer Values as** field, select **VALUE**.
   e. Uncheck the **Sync Time with PI Server** check box.
   f. In the **Default Timestep** field, leave blank.
   g. In the **Subsecond Digits** field, leave blank.
   h. In the **Query Control** section:
      i. In the **Timeout** field, enter **180**.
      ii. Uncheck the **Trap Expensive Queries** check box.
   i. In the **Aggregate Timestamp** field, select **End of Interval**.
   j. In the **If timeout or expensive** field, select **Abort**.
   k. Click **OK** to close the **PI ODBC Data Source Setup** dialog.
In the ODBC Data Source Administrator (32-bit) window, click **Apply**, then click **OK**.
5  **PI SQL Subsystem Configuration (PI Historian Only)**

➢ To verify PI SQL subsystem configuration
1. From the Control Panel, select Administrative Tools.
2. Double-click Services.
3. In the Services window, double-click the PI SQL Subsystem service.
4. In the PI SQL Subsystem Properties dialog, General tab, select Automatic from the Startup type drop-down list.
5. Click Start.
6. Click OK to close the PI SQL Subsystem Properties dialog.
7. Click X to close the Services window.
6 Web Browser Configuration

Note A printer must be configured for the Historian before configuring the web browser.

➢ To configure Internet Explorer

1. Log on to the computer using the Administrator account and password.
2. Open an Internet Explorer window.
3. From the Print menu, click Page Setup.
4. In the Page Setup dialog:
   a. Clear the Headers and Footers fields.
   b. Set all Margins (inches) fields to 0.25.
   c. Click OK.
5. Repeat this procedure after logging on using the Maint and Oper accounts and passwords.

➢ To configure Google Chrome

1. Log on to the computer using the Administrator account and password.
2. Open a Google Chrome window.
3. From the Google menu, click Print or press [Ctrl]+[P].
4. From the Print menu, click + More settings.
5. In the expanded Print pane:
   a. In the Margins field, select Custom from the drop-down and set all margins to 0.25”.
   b. In the Options field, uncheck the Headers and Footers check box.
c. Click **Cancel**. Your settings are saved.

6. Repeat this procedure after logging on using the Maint and Oper accounts and passwords.