

Historian Report Post-installation Instruction Guide

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Document Updates

Rev	Location	Description
E	Proficy Historian OLE DB Installation	Replaced installation instructions with reference to GEH-6745
	PI ODBC Installation	Replaced installation instructions with reference to GEH-6744
	Add ODBC Data Source	Updated to differentiate PI 2015 and PI 2018 SP3 systems
	Web Browser Configuration	Updated to include Google Chrome
D	Throughout document	Added support for later operating systems after Windows 7 and Windows Server 2008 R2
C	Throughout document	Removed references and content related to Windows XP and Windows Server 2003; no longer supported beginning with ControlIST V06.00).

Contents

- 1 Introduction 4
- 2 Proficy Historian OLE DB Installation (Proficy Historian Only) 4
- 3 PI ODBC Installation (PI Historian only) 4
- 4 Add ODBC Data Source (PI Historian Only) 5
 - 4.1 PI 2018 SP3 Systems 5
 - 4.2 PI 2015 Systems 6
- 5 PI SQL Subsystem Configuration (PI Historian Only)..... 8
- 6 Web Browser Configuration..... 9

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 *C:\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;).

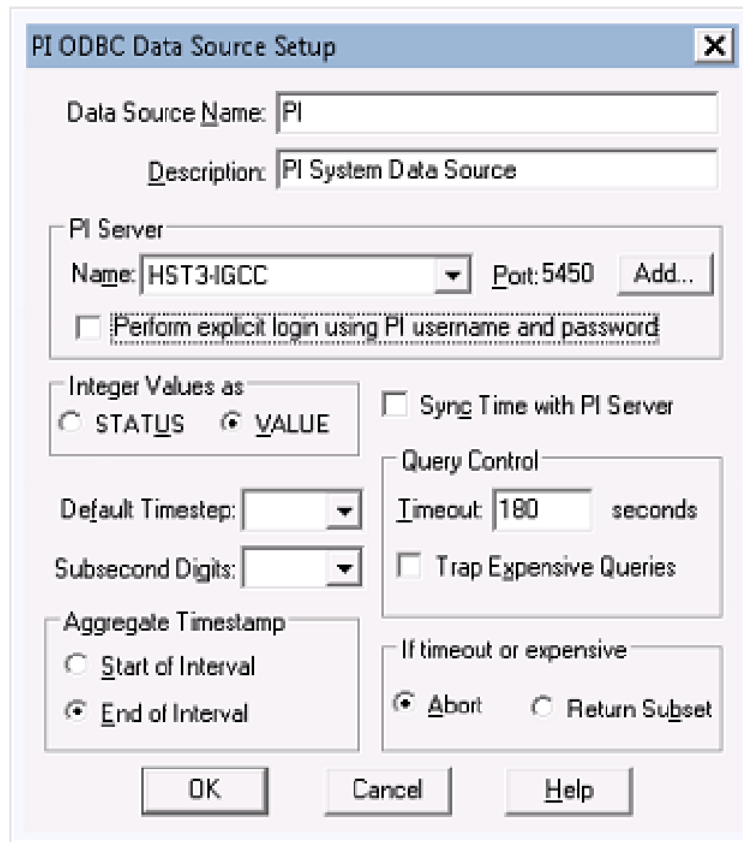
The screenshot shows the 'PI ODBC DSN Setup' dialog box. The 'Name' field contains 'PI' and the 'Description' field contains 'PI System Data Source'. Under 'PI SQL Data Access Server', the 'Name' field contains 'HST2' and the 'Trusted connection' checkbox is checked. The 'Credentials' section has empty 'User' and 'Password' fields. In the 'Data Source' section, the 'Type' dropdown is set to 'PI OLEDB Provider', the 'PI Data Archive' field contains 'HST2', the 'Initial catalog' field is empty, and the 'Options' field contains 'Integrated Security=SSPI;'. The 'Test Connection', 'OK', and 'Cancel' buttons are visible at the bottom.

- 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.



7. 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**

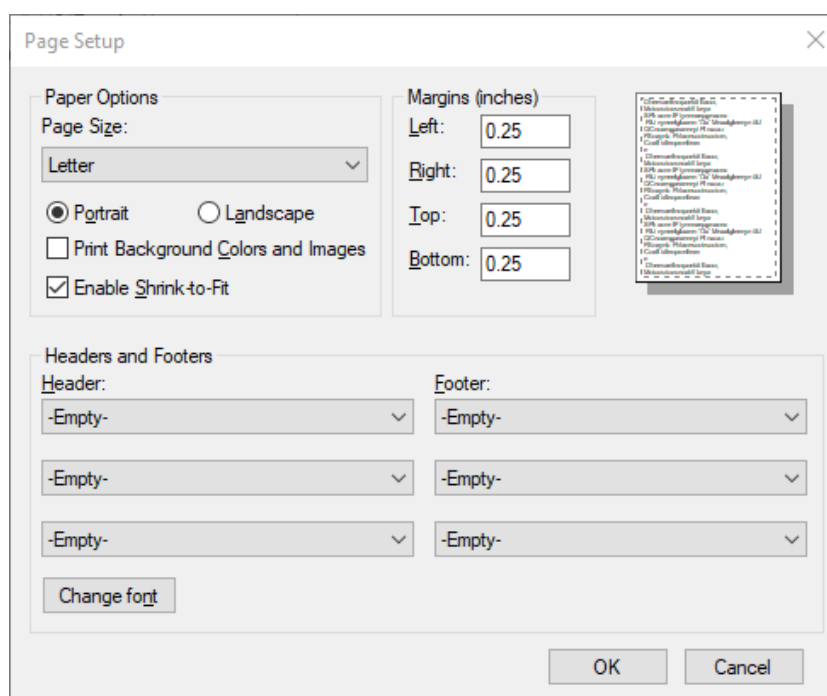
1. From the **Control Panel**, select **Administrative Tools**.
2. Double-click **Services**.
3. In the *Services* window, double-click the **PI SQL Subsystem** service.
4. In the *PI SQL Subsystem Properties* dialog, *General* tab, select **Automatic** from the **Startup type** drop-down list.
5. Click **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.

Print

Total: 1 sheet of paper

[Print](#) [Cancel](#)

Destination  Adobe PDF (redirected 6) (r...
[Change...](#)

Pages All
 e.g. 1-5, 8, 11-13

Layout [Portrait](#) ▼

Color [Color](#) ▼

Paper size [Letter](#) ▼

Margins [Custom](#) ▼

Quality [1200 dpi](#) ▼

Options Headers and footers
 Background graphics

[Fewer settings](#)

[Print using system dialog... \(Ctrl+Shift+P\)](#)

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



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