Historian Report Post-installation Instruction Guide

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### Document Updates

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<tr>
<td>D</td>
<td>Throughout document</td>
<td>Added support for later operating systems after Windows 7 and Windows Server 2008 R2</td>
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<tr>
<td>C</td>
<td>Throughout document</td>
<td>Removed references and content related to Windows XP and Windows Server 2003; no longer supported beginning with ControlST V06.00).</td>
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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:

Attention

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

- Install Proficy*-based Historian OLE DB (Proficy-based Historian only)
- Install PI-ODBC (PI-based Historian only)
- Add ODBC Data Source (PI-based Historian only)
- Verify PI-SQL subsystem configuration (PI-based Historian only)
- Configure Internet Explorer

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.
To install the Proficy-based Historian OLE DB

1. Insert the Proficy Historian DVD. The Historian splash screen displays.

Note If this screen does not automatically display, double-click the InstallFrontEnd.exe file on the DVD to display it. If a security warning message displays, click Run to proceed.

2. Click Historian Client Tools. A message dialog box displays to confirm the install.

3. Click Run to proceed. The install program starts and the Welcome dialog box displays.

4. Click Next to proceed. The License Agreement dialog box displays.

5. Click Yes to continue. The Select Features dialog box displays.
Accept the default Destination Folder or browse for a new location. Click Next. The Choose the Log and Buffer Folder dialog box displays.
6. Click **Next**. A message dialog box displays.

7. Select **Yes, I want to restart my computer now**, and click **Finish** to complete the installation.
3 Install PI ODBC (PI-based Historian only)

➢ To install PI ODBC

1. Insert the **PI Data Access Package** CD into the CD drive of the computer that Historian is installed on. The installer autostart screen displays.
2. Scroll down the menu and select **PIODBC 1.n.n.**
3. When prompted to Open, Save, or Cancel displays, select **Open**.
4. When prompted to select an installation folder, accept the default destination folder or browse for a new location.
5. When prompted to install a **Shared** version or a **Standalone** version, select **Standalone**. The **PI PC Root Directory** dialog box displays.
6. When prompted to create a sample PI ODBC Source called PI, select **No**.
7. Click **OK** on subsequent dialog boxes.
8. Close the ***OSI Software*** main menu. The PI ODBC is installed.
4 Add ODBC Data Source (PI-based Historian Only)

On Windows 7 64-bit and Windows Server 2008 R2 and later operating systems, 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. To determine if your Windows 7 or later operating system is 32 or 64-bit, click Start, Control Panel, and System. The System type:, displayed in the right pane, indicates whether it is a 32 or 64-bit operating system.

On 64-bit operating systems, the 32-bit ODBC Data Source Administrator is typically located in C:\Windows\SysWOW64\odbcad32.exe

➢➢ To add the ODBC data source

**Note** On Windows 7 64-bit or later, or Windows Server 2008 R2 or later, run C:\Windows\SysWOW64\odbcad32.exe and go to step 4 (skip steps 1 - 3).

1. From the Start menu, select Settings and Control Panel. The Control Panel window displays.
2. Double-click Administrative Tools.
3. Double-click Data Sources (ODBC). The ODBC Data Source Administrator dialog box displays.
4. Select the System DSN tab.
5. Click Add. The Create New Data Source dialog box displays.
6. Select PI ODBC.
7. Click Finish. The PI ODBC Data Source Setup dialog box displays.

For Windows 7 and later, or Windows Server 2008 R2 and later:

- Select Description and enter PI System data source.
- Leave Perform explicit login using PI username and password as unchecked.
- Select VALUE.
- Clear the Sync Time with PI Server check box.
- Set the Timeout field to 108 seconds.
- Clear the Trap Expensive Queries check box.
8. Click OK. The ODBC Data Source Administrator dialog box displays.
9. Click OK.

5  Verify PI SQL Subsystem Configuration (PI Historian Only)

➢➢ To verify PI SQL subsystem configuration
1. From the Start menu, select Settings and Control Panel. The Control Panel window displays.
2. Double-click Administrative Tools.
4. Double-click the PI SQL Subsystem service. The PI SQL Subsystem dialog box displays.
5. From the Startup type list box, select Automatic Startup.
6. Click Start.
6 Configure Internet Explorer

Note A printer must be configured for the Historian before configuring Internet Explorer.

➢ 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 File menu, click Page Setup. The Page Setup dialog box displays.

4. From the File menu, click Exit.
5. Log off of the computer.
6. Repeat this procedure after logging on using the Maint and Oper accounts and passwords.