

SIEMENS

Information Server -
Installation Notes

1

Information Server -
Release Notes

2

SIMATIC

SIMATIC Information Server

3

Information Server SIMATIC Information Server

System Manual

Legal information

Warning notice system

This manual contains notices you have to observe in order to ensure your personal safety, as well as to prevent damage to property. The notices referring to your personal safety are highlighted in the manual by a safety alert symbol, notices referring only to property damage have no safety alert symbol. These notices shown below are graded according to the degree of danger.

 DANGER
indicates that death or severe personal injury will result if proper precautions are not taken.

 WARNING
indicates that death or severe personal injury may result if proper precautions are not taken.

 CAUTION
indicates that minor personal injury can result if proper precautions are not taken.

NOTICE
indicates that property damage can result if proper precautions are not taken.

If more than one degree of danger is present, the warning notice representing the highest degree of danger will be used. A notice warning of injury to persons with a safety alert symbol may also include a warning relating to property damage.

Qualified Personnel

The product/system described in this documentation may be operated only by **personnel qualified** for the specific task in accordance with the relevant documentation, in particular its warning notices and safety instructions. Qualified personnel are those who, based on their training and experience, are capable of identifying risks and avoiding potential hazards when working with these products/systems.

Proper use of Siemens products

Note the following:

 WARNING
Siemens products may only be used for the applications described in the catalog and in the relevant technical documentation. If products and components from other manufacturers are used, these must be recommended or approved by Siemens. Proper transport, storage, installation, assembly, commissioning, operation and maintenance are required to ensure that the products operate safely and without any problems. The permissible ambient conditions must be complied with. The information in the relevant documentation must be observed.

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Disclaimer of Liability

We have reviewed the contents of this publication to ensure consistency with the hardware and software described. Since variance cannot be precluded entirely, we cannot guarantee full consistency. However, the information in this publication is reviewed regularly and any necessary corrections are included in subsequent editions.

Table of contents

1	Information Server - Installation Notes	5
1.1	Licenses.....	5
1.2	System requirement.....	6
1.2.1	Checking system requirements.....	6
1.2.2	Hardware requirements	7
1.2.2.1	Hardware requirements for Process Historian and Information Server installation on a single system	7
1.2.3	Software requirements	8
1.2.3.1	Operating systems	8
1.2.3.2	SQL Server	8
1.2.3.3	Data sources	8
1.2.3.4	Browser	9
1.2.3.5	Security settings	9
1.2.3.6	Certificates.....	12
1.3	Installation	14
1.3.1	Installing the Information Server	14
1.3.2	Starting the Information Server setup for PCS 7	15
1.3.3	Starting the Information Server setup for PCS neo	16
1.3.4	Configuring the Information Server	17
1.3.5	Configuring browser settings for the Information Server	18
1.3.6	Installing the Information Server database	19
1.3.7	Configuring a project in the Information Server	21
1.3.8	Installing Information Server Ready	22
1.4	Uninstalling	23
1.4.1	Uninstalling the Information Server	23
2	Information Server - Release Notes	25
2.1	Security information	25
2.2	Release Notes	25
2.3	Customer Support.....	25
3	SIMATIC Information Server	29
3.1	Installation of the Information Server	29
3.1.1	Licenses.....	29
3.1.2	System requirement.....	30
3.1.2.1	Checking system requirements.....	30
3.1.2.2	Hardware requirements	31
3.1.2.3	Software requirements	32
3.1.3	Installation	37
3.1.3.1	Installing the Information Server	37
3.1.3.2	Starting the Information Server setup for PCS 7	38
3.1.3.3	Starting the Information Server setup for PCS neo	39
3.1.3.4	Configuring the Information Server	41

3.1.3.5	Configuring browser settings for the Information Server	42
3.1.3.6	Installing the Information Server database	43
3.1.3.7	Configuring a project in the Information Server	44
3.1.3.8	Installing Information Server Ready	46
3.1.4	Uninstalling	47
3.1.4.1	Uninstalling the Information Server	47
3.2	Security information	47
3.3	Basics of the Information Server	48
3.4	Basics of the web application	50
3.5	Basics of the Office Add-In	52
3.6	Useful information	53
3.6.1	Operating the user interface of the Information Server Web application	53
3.6.2	Operating the user interface of the Office add-in of the Information Server	54
3.7	Web application	55
3.7.1	Web application	55
3.7.2	Step-by-step instructions	58
3.7.2.1	Opening a Web application	58
3.7.3	Navigation area	59
3.7.4	Breadcrumb bar	60
3.7.5	Work area Web application	60
3.7.5.1	Work area in the Web application	60
3.7.5.2	Step-by-step instructions	61
3.7.5.3	Dashboard	62
3.7.5.4	Reporting	100
3.7.5.5	Download	124
3.7.5.6	Administration	125
3.7.6	Header	160
3.7.6.1	Header	160
3.7.6.2	User profile	160
3.7.6.3	Notifications	161
3.7.6.4	Step-by-step instructions	162
3.8	Office add-in	168
3.8.1	Office add-in	168
3.8.2	Report types in the Office add-in	169
3.8.3	Subscriptions for report templates in Excel	169
3.8.4	Microsoft Office versions for the Office add-in	169
3.8.5	Requirements for installing the Office add-in	170
3.8.6	Step-by-step instructions	170
3.8.6.1	Installing Office add-in	170
3.8.6.2	Download Office add-in from the Web application	171
3.8.6.3	Connecting Office add-in to the Information Server without a stored certificate	171
3.8.6.4	Connecting Office add-in with a stored certificate to the Information Server	173
3.8.6.5	Open Office add-in	174
3.8.7	Excel Office add-in	174
3.8.7.1	Excel Office add-in	174
3.8.7.2	Toolbar in Excel	177
3.8.7.3	Footer in Excel	203

Information Server - Installation Notes

1.1 Licenses

List of clients

The clients include:

- Any browser when connected to the Information Server

License types

The SIMATIC Information Server provides the following license types:

Product	MLFB
Information Server Basic Package	6ES7652-7EX68-2YB0 6ES7652-7EX68-2YH0
Information Server (1 Client)	6ES7652-7YA00-2YB0 6ES7652-7YA00-2YH0
Information Server (3 Clients)	6ES7652-7YB00-2YB0 6ES7652-7YB00-2YH0
Information Server (5 Clients)	6ES7652-7YC00-2YB0 6ES7652-7YC00-2YH0
Information Server Datasource Access (1 Source)	6ES7652-7YE00-2YB0 6ES7652-7YE00-2YH0
Information Server Datasource Access (3 Sources)	6ES7652-7YF00-2YB0 6ES7652-7YF00-2YH0

Note

MLFB numbers

MLFB numbers ending with 2YB0 are physical deliveries.

MLFB numbers ending with 2YH0 are OSD deliveries.

License count for client access

Each active client connection of the Information Server requires a license. The number of clients depends on the number of PCs, not on the number of applications that are open on a PC. Even when multiple report clients are connected to the Information Server from a PC, only one license is required.

1.2 System requirement

Assignment of a client license:

- Connection with the Information Server via Internet browser/Web application
- Use of various URLs which the server cannot identify as one source

Release of a client license:

- Logout from the Web application
- Inactivity after 20 minutes

Trial license

The setup of the Information Server also installs a trial license. The trial license can be selected in the license query.

- 14-day validity
- Start of 14 day period on the day of first use

The trial version becomes a full version when you install a full license. Reinstallation is not necessary.

1.2 System requirement

1.2.1 Checking system requirements

Requirement

You check the requirements on the computer on which the Information Server is installed.

Procedure

1. Check if the hardware requirements for your installation are met.
Hardware requirements for a Process Historian and Information Server installation on a system (Page 7)
2. Ensure you are using an approved operating system.
Operating systems (Page 8)
3. Ensure you are using an approved SQL Server.
SQL Server (Page 8)
4. Check which data sources are allowed for use with the Information Server.
Data sources (Page 8)
5. Ensure you are using an approved browser.
Browser (Page 9)

6. Check whether all relevant security settings have been made.
Security settings (Page 9)
7. Check whether all relevant certificates are present.
Certificates (Page 12)

Result

The system requirements for an Information Server installation are fulfilled.

1.2.2 Hardware requirements

1.2.2.1 Hardware requirements for Process Historian and Information Server installation on a single system

Definition

Medium	Minimal	Recommended
CPU	INTEL XEON E3-1268L V3; 2.3 GHz	INTEL XEON E5-2650L V2; 2.6 GHz
Work memory (RAM)	16 GB (64-bit operating system)	32 GB (64-bit operating system)
Hard drive	≥ 500 GB SATA	≥ 1 TB SATA

Note

The hardware requirements are covered by the current SIMATIC industrial PCs.

Sequence of the installation of Process Historian and Information Server on a system

If you want to install Process Historian and Information Server on the same computer, they must be installed in the same SQL Server instance. You must install the Process Historian first.

Cleanup of the corrupt Information Server installation

If you did not install the Information Server together with the Process Historian but did so at a later time, use the following procedure to clean up the faulty installation:

1. Create a full SQL Server backup of the existing PH database.
Details are available in the section "Creating a Full PH Database Backup" in the FAQ: Backup and restore of a Process Historian database (https://support.industry.siemens.com/cs/attachments/66579062/66579062_pcs7_ph_backup_restore_en.pdf)
The procedure described there also applies to the SQL Server 2017.
When you use SIMATIC BATCH, the data provided by the batches are backed up separately in the Process Historian and must therefore be taken into account during the full backup.
2. Perform a complete new installation of the operating system.

1.2 System requirement

3. Start the general setup and select the installation for Process Historian and Information Server.
4. A new, empty Process Historian database is created. Use the same configuration settings for the newly created database.
5. Once the functionality is completed and verified, restore the previously created SQL Server backup of the Process Historian database in Microsoft SQL Server Management Studio. Details are available in the section "Restore Historian Storage Database" in the FAQ: Backup and restore of a Process Historian database (https://support.industry.siemens.com/cs/attachments/66579062/66579062_pcs7_ph_backup_restore_en.pdf)

1.2.3 Software requirements

1.2.3.1 Operating systems

Server operating system:

Version	Note
Windows Server 2019	64-bit

Desktop operating system:

Version	Note
Windows 10 LTSC 1809 or later	64-bit

1.2.3.2 SQL Server

When the SIMATIC Information Server is installed, the Microsoft SQL Server is automatically installed.

SQL Server	Comment
Microsoft SQL Server 2017	64-bit

1.2.3.3 Data sources

Data source	Version
Process Historian	2020
WinCC	7.4 SP1
	7.5 SP1
	7.5 SP2
PCS neo	3.0 SP1 or higher -> This version is to be used for PCS neo only after consulting with our customer service.

Data source	Version
WinCC / PCS 7 OS	7.4 SP1
	7.5 SP1
	7.5 SP2
PMO	7.4 SP1
	7.5 SP1
	7.5 SP2

Note

Each data source is only compatible with the most recent update of the corresponding version.

1.2.3.4 Browser

Browser	Version	Link to the download
Mozilla Firefox	Current version	Mozilla Firefox Download (https://www.mozilla.org/de/firefox/new/)
Google Chrome	Current version	Google Chrome Download (https://www.google.de/chrome/browser/desktop/)

Note**Browser selection**

It is recommended to use Google Chrome.

See also

Internet Explorer Download (<http://windows.microsoft.com/de-de/internet-explorer/download-ie>)

Microsoft Edge Download (<https://www.microsoft.com/de-de/windows/microsoft-edge>)

1.2.3.5 Security settings**Settings of the internal firewall for the Information Server**

The firewall settings for the Information Server are automatically changed during the setup. The changes are listed during the setup and can be saved.

Note

The security settings of the firewall are the basis of the security concept.

1.2 System requirement

Name	Protocol	Port
IS Network Discovery	UDP	137
IS Web Access https	TCP	443
IS Data Host	TCP	49081
IS DiscoverServiceInstaller	UDP	5049
IS Ready Update plugin	TCP	1200
IS Ready Archive Plugin	TCP	1201
Scheduler	TCP	49082

Note

Network protection

Unused ports of unused functions should be closed manually to secure the system (e.g. IS Ready Update Plugin for installation from IS to PH).

Firewall settings when using different subnets

When using different subnets, you need to adapt certain firewall settings accordingly:

Computer	Action	Name	Protocol	Port
Process Histori- an	Adapt rule	PH SQL server port	TCP	3723
Process Histori- an	Adapt rule	PH Discovery Services	TCP	5048
Process Histori- an	Create new rule	IS SQL Server Browsing	UDP	1434
Information Server	Adapt rule	Scheduler	TCP	49082

Note

Create the rule on the respective computer.

1. To modify the rules, open the "Windows Firewall with Advanced Security" dialog.
2. Go to the corresponding rule and open "Properties > Area" via the shortcut menu.
3. Select "IP Addresses" under "Remote IP Address".
4. Click "Add...".

Note

Here you can enter the IP addresses or the subnet.

5. Confirm the dialog.

Note

You must manually remove the firewall ports that have been opened by installing Information Server and IS-Ready after uninstalling.

Measures for communication on the Internet

Configure the server in such a way that only HTTPS connections are supported. You need a digital certificate for the Information Server.

For the **communication of the database and application servers in a shared area** use a demilitarized zone to exchange confidential data.

For the **communication of the database and application servers in a shared area** use, for example, a Private Network Tunnel (VPN), to establish trustworthy communication.

Avoidance of cross-site request forgery for the web server

Avoid working with other applications or services on the Internet. Always immediately log off from the application after using the Web server.

More information on IIS security can be found under the following link. IIS security ([https://msdn.microsoft.com/en-us/library/ms172965\(v=sql.105\).aspx](https://msdn.microsoft.com/en-us/library/ms172965(v=sql.105).aspx))

Security architecture "defense in depth"

Note the following information from Siemens on the topic "Industrial Security". The Web site contains information on the universal protection concept in accordance with recommendations of the leading standard for security in industrial automation ISA99/IEC 62443.

Link: Industrial Security (<http://www.industry.siemens.com/topics/global/en/industrial-security/Pages/default.aspx>)

Mitigation of "Denial of Service" attacks

The SIMATIC Web Configurator activates the dynamic IP security feature of the Microsoft Internet Information Services page created for the Information Server to mitigate "Denial of Service" attacks on the Information Server. Only up to 50 connections to the site are allowed in total, with no more than 2000 requests per connection in 10 seconds. If the request limit is exceeded, renewed access is temporarily prevented.

See also

Setting up an HTTPS service in IIS (<https://support.microsoft.com/en-us/kb/324069>)

Creating a DMZ network with Proxyserver 2.0 (<https://support.microsoft.com/en-us/kb/191146>)

Creating a VPN connection ([https://technet.microsoft.com/en-us/library/cc726062\(v=ws.10\).aspx](https://technet.microsoft.com/en-us/library/cc726062(v=ws.10).aspx))

1.2 System requirement

1.2.3.6 Certificates

You need a certificate for securing the connection between the server and client.

You have the option of creating a temporary self-signed certificate or importing an existing certificate on the computer. You then assign the provided certificate to the corresponding server.

Creating a self-signed certificate:

1. Open "Start > Control Panel > System and Security > Administration".
The dialog "Administration" opens.
2. Double-click the link "Internet Information Services (IIS) Manager".
The dialog box "Internet Information Services (IIS) Manager" opens.
3. Select the server under "Connections" on the left.



4. In the overview, double-click the "Server Certificates" feature in the "IIS" area.
5. Select the option "Create a self-signed certificate..." on the right under "Actions...".
The "Create self-signed certificate..." dialog opens.
6. Select the display name for the certificate and confirm the entry with "OK".
The certificate created is located in the overview "Server certificates".

Importing a certificate

Ensure that a certificate is saved on the computer.

1. Open "Start > Control Panel > System and Security > Administration".
The dialog "Administration" opens.
2. Double-click the link "Internet Information Services (IIS) Manager".
The dialog box "Internet Information Services (IIS) Manager" opens.
3. Select the server under "Connections" on the left.



4. Double-click the feature "Server certificates" in the overview in the "IIS" area.
5. Select the option "Import..." under "Actions" on the right.
The dialog "Import certificate..." opens.
6. Click "...".
A dialog opens with which you navigate to the certificate on your computer.
7. Load the certificate into the dialog by double-clicking it and click "OK".

Assigning a certificate

1. Open "Start > Control Panel > System and Security > Administration".
The dialog "Administration" opens.
2. Double-click the link "Internet Information Services (IIS) Manager".
The dialog box "Internet Information Services (IIS) Manager" opens.
3. Select the server under "Connections" on the left.



4. Double-click on "Sites" and select "Siemens".
5. In the area on the right under "Actions > Edit Site" select the option "Bindings...".
The dialog "Site Bindings" opens.
6. Select the HTTPS binding and click "Edit...".
The "Edit Site Binding" dialog opens.
7. Select the corresponding SSL certificate and confirm with "OK".

Exporting a certificate

1. Open "Start > Control Panel > System and Security > Administrative Tools".
The "Administrative Tools" dialog opens.
2. Double-click the "Internet Information Services (IIS) Manager" link.
The "Internet Information Services (IIS) Manager" dialog opens.
3. Select the server under "Connections" on the left.



4. In the overview, double-click the "Server Certificates" feature in the "IIS" area.
5. Right under "Actions", select the "Export..." option.
The "Export certificate..." dialog opens.
6. Click on the "..." button.
A dialog opens in which you can select the storage location.
7. Confirm the backup.

Note

Reports from SIMATIC Batch

If reports from the SIMATIC Batch Server are to be generated with the Information Server, the generated certificate must be exported and imported onto the server or client.

1.3 Installation

1.3.1 Installing the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
Check system requirements (Page 6)
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.

Procedure

Note

Depending on the contents of the installation, you might be prompted to restart one or more times during the installation process.

During the installation process, additional setup dialogs can be opened automatically. If the setup does not continue after a while, use the key combination "Alt+Tab" to change the view. This is how you check whether there is another setup dialog in the background that requires additional input.

1. Start the setup of the Information Server.
Starting the Information Server setup for PCS 7 (Page 15)
Starting the Information Server setup for PCS neo (Page 16)
2. Configure the Information Server.
Configuring the Information Server (Page 17)
3. Configure the browser settings before using the Information Server.
Configuring browser settings for the Information Server (Page 18)
4. Install the Information Server database.
Installing the Information Server database (Page 19)
5. Install the IS Ready.
Installing IS Ready

Note

The installation of the IS Ready is only necessary for PCS 7 / WinCC installations.

6. Configure a project on the Information Server.
Configuring a project on the Information Server (Page 21)

Result

The Information Server is installed.

1.3.2 Starting the Information Server setup for PCS 7**Requirement**

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
Check system requirements (Page 6)
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.

Procedure

Note

Depending on the contents of the installation, you might be prompted to restart one or more times during the installation process.

During the installation process, additional setup dialogs can be opened automatically. If the setup does not continue after a while, use the key combination "Alt+Tab" to change the view. This is how you check whether there is another setup dialog in the background that requires additional input.

1. Start the PCS 7 setup from the DVD "PCS 7 V9.1".
2. Select the setup language.
3. Read the installation instructions.
4. Accept the license agreement.
5. Select the installation content.

Note

You can install the Information Server and the IS Ready in the setup simultaneously or separately.

If you want to install Process Historian and Information Server on a system, use the installation package "Process Historian and Information Server".

6. Accept the license agreement.
7. Accept the changes of the system settings.
8. After completion, conclude the setup with a restart.

1.3 Installation

Result

The setup of the Information Server is started. The "SIMATIC Web Configurator" dialog open.

1.3.3 Starting the Information Server setup for PCS neo

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
Check system requirements (Page 6)
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- Before manually installing the Process Historian/Information Server, the target computer must be configured in the Administration Console:

Note

Configuration of the target computer in the Administration Console

Before manually installing the Process Historian/Information Server, the target computer must be configured in the Administration Console:

1. Install AC Agent via "AdditionalProducts\AC Agent" of the PCS neo setup or a remote installation of the AC agent from the AC Server to the Process Historian-Server/Information Server.
2. Add the Process Historian Server/Information Server to the Administration Console.
3. Create an AC server certificate for the Process Historian Server/Information Server.

To do so, follow the instructions in the PUD for the Administration Console:

- Administration > SIMATIC PCS neo Administration Console > Getting Started > Use cases > Create setup definition for AC agent
- Administration > SIMATIC PCS neo Administration Console > Communication > Adding target computer to AC
- Administration > SIMATIC PCS neo Administration Console > Communication > Use cases > Create certificate for target computer

After successful local installation of Process Historian/Information Server, perform the following advanced steps in the Administration Console:

1. Connect the PH/IS computer to the UMC domain.
2. Determine the inventory data for the PH/IS computer.
3. Update the distribution of the configuration.

Follow the instructions in the PUD: "Administration > SIMATIC PCS neo Administration Console > Inventory > Inventory of target computers"

Procedure

Note

Depending on the contents of the installation, you might be prompted to restart one or more times during the installation process.

During the installation process, additional setup dialogs can be opened automatically. If the setup does not continue after a while, use the key combination "Alt+Tab" to change the view. This is how you check whether there is another setup dialog in the background that requires additional input.

1. In the PCS neo setup, select the installation of the Information Server in the module overview: "SIMATIC PCS neo Information Server".

Note

Selecting installation contents

Only a combined installation of the Process Historian and Information Server is released for PCS neo.

2. Select the setup language.
3. Select the installation content.
4. Accept the license agreement.
5. Accept the changes of the system settings.
6. After completion, conclude the setup with a restart.

Result

The setup of the Information Server is started. The "SIMATIC Web Configurator" dialog open.

1.3.4 Configuring the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- Installation of the Information Server in combination with PCS neo requires a configuration of the target computer in the Administration Console.

1.3 Installation

Configuration

1. The "SIMATIC Web Configurator" dialog opens.
You see an overview of the configuration procedure.
The "IIS configuration" dialog opens.
2. In the "IIS Configuration" dialog, enter a name under "Application name" or accept the pre-selection, "Information Server".
3. In the "IIS Configuration" dialog, select the option: "Create a virtual directory":

Note

Do not change the default.

4. Confirm with "OK".
5. Enter a user name and password in the "Change Service Account" dialog.
Leave the box checked if you want the user information to be used for all services.
6. Confirm with "Log on as".
7. After completing the configuration, restart the computer.

Result

The Information Server configuration is complete.

1.3.5 Configuring browser settings for the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- During the initial installation, the "Automatic logon with user name and password" option must be selected in your browser under "Options > Internet Options > Security > Privacy Level > User Authentication > Logon".
- The user that you log on to the "Change Service Account" dialog during configuration must have the following rights for each of the following services:
 - Information Server Scheduler: Access to the WebHost database, access to the configured data sources (e.g. PH), permissions to send e-mails
 - Information Server DataHost Service: Access to the configured data sources (e.g. PH)
 - InfSrvPool: Access to the WebHost database, access to the configured data sources (e.g. PH)

Browser settings

Adapt the settings of your browser for the Information Server .

Note

Do not change the following settings until after the initial commissioning of the Information Server.

1. Open the "Internet options" dialog from the Start menu.
2. In the "Internet Properties" dialog, select the "Security" tab.
3. For the current zone, disable the "Enable Protected Mode" setting.
4. Select the zone "Trusted Sites" > "Sites".
5. Add the following Web page to the "Web Pages" list: "https://<CN of the certificate>".

Note

CN of the certificate

1. Open the "Internet Information Services (IIS) Manager".
 2. Under "Connections" "Sites", select the "Siemens" site.
 3. Select "Edit Site" > "Bindings".
 4. In the "Site bindings" dialog, select the https connection and select "Edit".
 5. Select the SSL certificate and select "Display".
 6. The Common Name can be found in the "Details" < "Subject" tab.
-
6. Select "Privacy Level".
 7. Under "User authentication > Logon", select the "Prompt for user name and password" option in the "Security Settings" dialog.

Result

The browser settings are configured.

1.3.6 Installing the Information Server database

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.

1.3 Installation

- During the initial installation, the "Automatic logon with user name and password" option must be selected in your browser under "Options > Internet Options > Security > Privacy Level > User Authentication > Logon".
- The user that you log on to the "Change Service Account" dialog during configuration must have the following rights for each of the following services:
 - Information Server Scheduler: Access to the WebHost database, access to the configured data sources (e.g. PH), permissions to send e-mails
 - Information Server DataHost Service: Access to the configured data sources (e.g. PH)
 - InfSrvPool: Access to the WebHost database, access to the configured data sources (e.g. PH)

Installation of the Information Server database

1. Open the browser.
2. Enter the previously defined URL in the browser bar or use the Information Server shortcut on the desktop
The Information Server web application opens.
3. From the drop-down list, select a Microsoft SQL Server instance in which the Information Server stores its data.

Note

Adding a database file path

By default, the database files are stored in the SQL directory "Data" (e.g. C:\Program Files\Microsoft SQL Server\MSSQL14.HISTORIAN\MSSQL\DATA).

If you want to select a location, select the "Enter database file path" option and add the destination path.

4. Confirm with "Install or update".
5. When the installation is complete, select "Continue".
6. In the project configuration, select "Add Project".
7. Assign a data source type to the project and confirm with "Continue".
8. Specify a computer name by entering a "Host name" or a "Server IP".
9. Select "Select projects".
10. Select the projects you want to add and enter their names.
11. Select "Add".

Result

A database is installed in the Information Server.

1.3.7 Configuring a project in the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- During the initial installation, the "Automatic logon with user name and password" option must be selected in your browser under "Options > Internet Options > Security > Privacy Level > User Authentication > Logon".
- The user that you log on to the "Change Service Account" dialog during configuration must have the following rights for each of the following services:
 - Information Server Scheduler: Access to the WebHost database, access to the configured data sources (e.g. PH), permissions to send e-mails
 - Information Server DataHost Service: Access to the configured data sources (e.g. PH)
 - InfSrvPool: Access to the WebHost database, access to the configured data sources (e.g. PH)

Project configuration in the Information Server

1. Open the administration area of the web application.
2. Open the project configuration.
3. Select "Add project".
4. Assign a data source type to the project and confirm with "Continue".
5. Specify a computer name by entering a "Host name" or a "Server IP".

Note

Integration of the Information Server in PCS neo

In the dialog, enter an alias and the exact host name that is used in the certificate of the PCS neo Portal.

If this name is not entered correctly, the Information Server cannot be successfully integrated into the portal.

6. Select "Select projects".
7. Select the projects you want to add and enter their names.

Note

SIMATIC PCS neo Host Name

Enter here the FQDN name of the PCS neo Engineering station so that you can switch to the Information Server in the PCS neo Engineering Portal.

8. Select "Add".

1.3 Installation

Result

A project is configured in the Information Server.

1.3.8 Installing Information Server Ready

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems. Password changes must be tracked in all systems.
- For using the IS Ready with Process Historian: The IS Ready Service user must be created as a system administrator on the SQL Server instance.

Installation of the Information Server Ready on the Process Historian computer

1. Open the setup folder.
2. Select the "Start.exe" file of the component to be installed.
3. Select the language.
4. Read the installation instructions.
5. Accept the license agreement.
6. Select the installation content.
You see an overview of the setup for the installation process.
7. The installation is completed.
Restart the system now or at a later time.

Configuration on the Process Historian computer

1. Open "Start > All Programs > Siemens Automation > SIMATIC > IS Ready".
2. Select "IS Ready Configuration".
The "IS Ready Configurator" opens.
3. Select "Next".

4. Enter your logon information.
You see an overview of the setup for the installation process.
5. Select "Finish".

Note**Checking the configuration**

The configuration was successful if you have been assigned to the "SIMATIC Reporting Services" group under "Local Users and Groups" on your computer.

Result

Information Server Ready is installed.

1.4 Uninstalling

1.4.1 Uninstalling the Information Server

Requirement

- An Information Server is installed.

Procedure

1. Go to "Control Panel > Programs and Features".
2. Select the item SIMATIC Information Server.
3. Select the "Uninstall" menu command.
4. Accept the uninstallation.

Result

The Information Server is uninstalled.

Note

During uninstallation, no generated reports or the database are deleted.

1.4 Uninstalling

Information Server - Release Notes

2.1 Security information

Siemens provides products and solutions with industrial security functions that support the secure operation of plants, systems, machines and networks.

In order to protect plants, systems, machines and networks against cyber threats, it is necessary to implement – and continuously maintain – a holistic, state-of-the-art industrial security concept. Siemens' products and solutions constitute one element of such a concept.

Customers are responsible for preventing unauthorized access to their plants, systems, machines and networks. Such systems, machines and components should only be connected to an enterprise network or the internet if and to the extent such a connection is necessary and only when appropriate security measures (e.g. firewalls and/or network segmentation) are in place.

For additional information on industrial security measures that may be implemented, please visit

<https://www.siemens.com/industrialsecurity> (<https://www.siemens.com/industrialsecurity>).

Siemens' products and solutions undergo continuous development to make them more secure. Siemens strongly recommends that product updates are applied as soon as they are available and that the latest product versions are used. Use of product versions that are no longer supported, and failure to apply the latest updates may increase customer's exposure to cyber threats.

To stay informed about product updates, subscribe to the Siemens Industrial Security RSS Feed under

<https://www.siemens.com/industrialsecurity> (<https://www.siemens.com/industrialsecurity>).

2.2 Release Notes

Contents

These release notes contain important notes for the SIMATIC Information Server and Process Historian. The information in these Release Notes takes precedence over statements in the manuals and in the online help. Read these Release Notes carefully because they contain useful information for you.

2.3 Customer Support

SIMATIC Hotline

You can reach the SIMATIC hotlines at the times specified in the following table. The languages of the SIMATIC hotlines are generally German and English. The Authorization Hotline also speaks French, Italian or Spanish.

Technical Support

Nuremberg	(GMT + 1:00)
Office hours	Mo. - Fr. from 8:00 am - 5:00 pm (CET/CEST)
Phone	+49 (0)911 895 7222
Fax	+49 (0)911 895 7223
E-mail	Support request (https://support.industry.siemens.com/My/ww/en/requests)

Automation Value Card (AVC)

The Automation Value Card (AVC) provides you with extended technical support, e.g. 24-hour availability seven days a week. You can find information about the AVC at the following URL:

Automation Value Card (<https://support.industry.siemens.com/cs/sc/2021/automation-value-card?lc=en-WW>)

SIMATIC Customer Online Support

Service and Support

You can find an overview of the support offerings for our products at the following URL:

Online support (<https://support.industry.siemens.com/cs/start?lc=en-WW>)

Support app

For Siemens support on the go, get the app:

Support app (<https://support.industry.siemens.com/cs/sc/2067/mobile-use-via-app?lc=en-WW>)

Documentation

Technical Forum

The Technical Forum supports exchange with other SIMATIC users. You can find it at the following URL:

Technical Forum (<https://support.industry.siemens.com/tf/>)

Technical documentation for SIMATIC products

You can find a guide to the technical documentation offered for the individual SIMATIC products and systems at the following URL:

Technical documentation portal (<https://support.industry.siemens.com/cs/document/109742705/documentation?dti=0&lc=en-WW>)

FAQ

The following FAQs are available to help you use the Information Server:

- Creation of report templates for the Information Server based on the Process Historian data in the WinCC and PCS 7 environment.
FAQ creation of report templates. (<https://support.industry.siemens.com/cs/document/64906050/creation-of-report-templates-for-the-information-server-based-on-process-historian-data-in-the-wincc-und-pcs-7-environment?dti=0&lc=en-US>)
- How can you update the SQL Server Reporting Services (SSRS)?
FAQ Update SQL Server Reporting Services (<https://support.industry.siemens.com/cs/document/109748195/what-should-you-watch-out-for-when-installing-simatic-process-historian-simatic-information-server-2014-sp2-upd3-when-wincc-is-already-installed?dti=0&lc=en-US>)
- How can you update the SQL Server on at SIMATIC Process Historian/ Information Server?
FAQ Update SQL Server for SIMATIC PH/IS (<https://support.industry.siemens.com/cs/document/109748200/how-do-you-update-the-sql-server-with-simatic-process-historian-information-server?dti=0&lc=en-US>)
- How can you correctly display Information Server reports in Asian languages under Windows 10?
FAQ correct presentation of reports in Asian languages under Windows 10. (<https://support.industry.siemens.com/cs/document/109748197/in-windows-10-how-do-you-correctly-display-information-server-reports-in-asian-languages?dti=0&lc=en-US>)

Product information

SIMATIC products

You can find general information on SIMATIC products at the following URL:

Overview of SIMATIC products (<http://w3.siemens.com/mcmts/topics/en/simatic/Pages/default.aspx>)

Information Server

You can find general information about the Information Server at the following URL:

SIMATIC Information Server (<http://w3.siemens.com/mcmts/automation-software/en/scada-software/scada-options/simatic-information-server/Pages/Default.aspx>)

SIMATIC Information Server

3.1 Installation of the Information Server

3.1.1 Licenses

List of clients

The clients include:

- Any browser when connected to the Information Server

License types

The SIMATIC Information Server provides the following license types:

Product	MLFB
Information Server Basic Package	6ES7652-7EX68-2YB0 6ES7652-7EX68-2YH0
Information Server (1 Client)	6ES7652-7YA00-2YB0 6ES7652-7YA00-2YH0
Information Server (3 Clients)	6ES7652-7YB00-2YB0 6ES7652-7YB00-2YH0
Information Server (5 Clients)	6ES7652-7YC00-2YB0 6ES7652-7YC00-2YH0
Information Server Datasource Access (1 Source)	6ES7652-7YE00-2YB0 6ES7652-7YE00-2YH0
Information Server Datasource Access (3 Sources)	6ES7652-7YF00-2YB0 6ES7652-7YF00-2YH0

Note

MLFB numbers

MLFB numbers ending with 2YB0 are physical deliveries.

MLFB numbers ending with 2YH0 are OSD deliveries.

License count for client access

Each active client connection of the Information Server requires a license. The number of clients depends on the number of PCs, not on the number of applications that are open on a PC. Even when multiple report clients are connected to the Information Server from a PC, only one license is required.

3.1 Installation of the Information Server

Assignment of a client license:

- Connection with the Information Server via Internet browser/Web application
- Use of various URLs which the server cannot identify as one source

Release of a client license:

- Logout from the Web application
- Inactivity after 20 minutes

Trial license

The setup of the Information Server also installs a trial license. The trial license can be selected in the license query.

- 14-day validity
- Start of 14 day period on the day of first use

The trial version becomes a full version when you install a full license. Reinstallation is not necessary.

3.1.2 System requirement

3.1.2.1 Checking system requirements

Requirement

You check the requirements on the computer on which the Information Server is installed.

Procedure

1. Check if the hardware requirements for your installation are met.
Hardware requirements for a Process Historian and Information Server installation on a system (Page 31)
2. Ensure you are using an approved operating system.
Operating systems (Page 32)
3. Ensure you are using an approved SQL Server.
SQL Server (Page 32)
4. Check which data sources are allowed for use with the Information Server.
Data sources (Page 32)
5. Ensure you are using an approved browser.
Browser (Page 33)

6. Check whether all relevant security settings have been made.
Security settings (Page 33)
7. Check whether all relevant certificates are present.
Certificates (Page 35)

Result

The system requirements for an Information Server installation are fulfilled.

3.1.2.2 Hardware requirements

Hardware requirements for Process Historian and Information Server installation on a single system

Definition

Medium	Minimal	Recommended
CPU	INTEL XEON E3-1268L V3; 2.3 GHz	INTEL XEON E5-2650L V2; 2.6 GHz
Work memory (RAM)	16 GB (64-bit operating system)	32 GB (64-bit operating system)
Hard drive	≥ 500 GB SATA	≥ 1 TB SATA

Note

The hardware requirements are covered by the current SIMATIC industrial PCs.

Sequence of the installation of Process Historian and Information Server on a system

If you want to install Process Historian and Information Server on the same computer, they must be installed in the same SQL Server instance. You must install the Process Historian first.

Cleanup of the corrupt Information Server installation

If you did not install the Information Server together with the Process Historian but did so at a later time, use the following procedure to clean up the faulty installation:

1. Create a full SQL Server backup of the existing PH database.
Details are available in the section "Creating a Full PH Database Backup" in the FAQ: Backup and restore of a Process Historian database (https://support.industry.siemens.com/cs/attachments/66579062/66579062_pcs7_ph_backup_restore_en.pdf)
The procedure described there also applies to the SQL Server 2017.
When you use SIMATIC BATCH, the data provided by the batches are backed up separately in the Process Historian and must therefore be taken into account during the full backup.
2. Perform a complete new installation of the operating system.
3. Start the general setup and select the installation for Process Historian and Information Server.

3.1 Installation of the Information Server

4. A new, empty Process Historian database is created. Use the same configuration settings for the newly created database.
5. Once the functionality is completed and verified, restore the previously created SQL Server backup of the Process Historian database in Microsoft SQL Server Management Studio. Details are available in the section "Restore Historian Storage Database" in the FAQ: Backup and restore of a Process Historian database (https://support.industry.siemens.com/cs/attachments/66579062/66579062_pcs7_ph_backup_restore_en.pdf)

3.1.2.3 Software requirements

Operating systems

Server operating system:

Version	Note
Windows Server 2019	64-bit

Desktop operating system:

Version	Note
Windows 10 LTSC 1809 or later	64-bit

SQL Server

When the SIMATIC Information Server is installed, the Microsoft SQL Server is automatically installed.

SQL Server	Comment
Microsoft SQL Server 2017	64-bit

Data sources

Data source	Version
Process Historian	2020
WinCC	7.4 SP1
	7.5 SP1
	7.5 SP2
PCS neo	3.0 SP1 or higher -> This version is to be used for PCS neo only after consulting with our customer service.
WinCC / PCS 7 OS	7.4 SP1
	7.5 SP1
	7.5 SP2

Data source	Version
PMO	7.4 SP1
	7.5 SP1
	7.5 SP2

Note

Each data source is only compatible with the most recent update of the corresponding version.

Browser

Browser	Version	Link to the download
Mozilla Firefox	Current version	Mozilla Firefox Download (https://www.mozilla.org/de/firefox/new/)
Google Chrome	Current version	Google Chrome Download (https://www.google.de/chrome/browser/desktop/)

Note**Browser selection**

It is recommended to use Google Chrome.

Security settings**Settings of the internal firewall for the Information Server**

The firewall settings for the Information Server are automatically changed during the setup. The changes are listed during the setup and can be saved.

Note

The security settings of the firewall are the basis of the security concept.

Name	Protocol	Port
IS Network Discovery	UDP	137
IS Web Access https	TCP	443
IS Data Host	TCP	49081
IS DiscoverServiceInstaller	UDP	5049
IS Ready Update plugin	TCP	1200
IS Ready Archive Plugin	TCP	1201
Scheduler	TCP	49082

Note**Network protection**

Unused ports of unused functions should be closed manually to secure the system (e.g. IS Ready Update Plugin for installation from IS to PH).

Firewall settings when using different subnets

When using different subnets, you need to adapt certain firewall settings accordingly:

Computer	Action	Name	Protocol	Port
Process Historian	Adapt rule	PH SQL server port	TCP	3723
Process Historian	Adapt rule	PH Discovery Services	TCP	5048
Process Historian	Create new rule	IS SQL Server Browsing	UDP	1434
Information Server	Adapt rule	Scheduler	TCP	49082

Note

Create the rule on the respective computer.

1. To modify the rules, open the "Windows Firewall with Advanced Security" dialog.
2. Go to the corresponding rule and open "Properties > Area" via the shortcut menu.
3. Select "IP Addresses" under "Remote IP Address".
4. Click "Add...".

Note

Here you can enter the IP addresses or the subnet.

5. Confirm the dialog.

Note

You must manually remove the firewall ports that have been opened by installing Information Server and IS-Ready after uninstalling.

Measures for communication on the Internet

Configure the server in such a way that only HTTPS connections are supported. You need a digital certificate for the Information Server.

For the **communication of the database and application servers in a shared area** use a demilitarized zone to exchange confidential data.

For the **communication of the database and application servers in a shared area** use, for example, a Private Network Tunnel (VPN), to establish trustworthy communication.

Avoidance of cross-site request forgery for the web server

Avoid working with other applications or services on the Internet. Always immediately log off from the application after using the Web server.

More information on IIS security can be found under the following link. IIS security ([https://msdn.microsoft.com/en-us/library/ms172965\(v=sql.105\).aspx](https://msdn.microsoft.com/en-us/library/ms172965(v=sql.105).aspx))

Security architecture "defense in depth"

Note the following information from Siemens on the topic "Industrial Security". The Web site contains information on the universal protection concept in accordance with recommendations of the leading standard for security in industrial automation ISA99/IEC 62443.

Link: Industrial Security (<https://new.siemens.com/global/en/products/automation/topic-areas/industrial-security.html>)

Mitigation of "Denial of Service" attacks

The SIMATIC Web Configurator activates the dynamic IP security feature of the Microsoft Internet Information Services page created for the Information Server to mitigate "Denial of Service" attacks on the Information Server. Only up to 50 connections to the site are allowed in total, with no more than 2000 requests per connection in 10 seconds. If the request limit is exceeded, renewed access is temporarily prevented.

Certificates

You need a certificate for securing the connection between the server and client.

You have the option of creating a temporary self-signed certificate or importing an existing certificate on the computer. You then assign the provided certificate to the corresponding server.

Creating a self-signed certificate:

1. Open "Start > Control Panel > System and Security > Administration".
The dialog "Administration" opens.
2. Double-click the link "Internet Information Services (IIS) Manager".
The dialog box "Internet Information Services (IIS) Manager" opens.
3. Select the server under "Connections" on the left.



4. In the overview, double-click the "Server Certificates" feature in the "IIS" area.

3.1 Installation of the Information Server

5. Select the option "Create a self-signed certificate..." on the right under "Actions...".
The "Create self-signed certificate..." dialog opens.
6. Select the display name for the certificate and confirm the entry with "OK".
The certificate created is located in the overview "Server certificates".

Importing a certificate

Ensure that a certificate is saved on the computer.

1. Open "Start > Control Panel > System and Security > Administration".
The dialog "Administration" opens.
2. Double-click the link "Internet Information Services (IIS) Manager".
The dialog box "Internet Information Services (IIS) Manager" opens.
3. Select the server under "Connections" on the left.



4. Double-click the feature "Server certificates" in the overview in the "IIS" area.
5. Select the option "Import..." under "Actions" on the right.
The dialog "Import certificate..." opens.
6. Click "...".
A dialog opens with which you navigate to the certificate on your computer.
7. Load the certificate into the dialog by double-clicking it and click "OK".

Assigning a certificate

1. Open "Start > Control Panel > System and Security > Administration".
The dialog "Administration" opens.
2. Double-click the link "Internet Information Services (IIS) Manager".
The dialog box "Internet Information Services (IIS) Manager" opens.
3. Select the server under "Connections" on the left.



4. Double-click on "Sites" and select "Siemens".
5. In the area on the right under "Actions > Edit Site" select the option "Bindings...".
The dialog "Site Bindings" opens.
6. Select the HTTPS binding and click "Edit...".
The "Edit Site Binding" dialog opens.
7. Select the corresponding SSL certificate and confirm with "OK".

Exporting a certificate

1. Open "Start > Control Panel > System and Security > Administrative Tools".
The "Administrative Tools" dialog opens.
2. Double-click the "Internet Information Services (IIS) Manager" link.
The "Internet Information Services (IIS) Manager" dialog opens.
3. Select the server under "Connections" on the left.



4. In the overview, double-click the "Server Certificates" feature in the "IIS" area.
5. Right under "Actions", select the "Export..." option.
The "Export certificate..." dialog opens.
6. Click on the "..." button.
A dialog opens in which you can select the storage location.
7. Confirm the backup.

Note

Reports from SIMATIC Batch

If reports from the SIMATIC Batch Server are to be generated with the Information Server, the generated certificate must be exported and imported onto the server or client.

3.1.3 Installation

3.1.3.1 Installing the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
Check system requirements (Page 6)
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.

Procedure

Note

Depending on the contents of the installation, you might be prompted to restart one or more times during the installation process.

During the installation process, additional setup dialogs can be opened automatically. If the setup does not continue after a while, use the key combination "Alt+Tab" to change the view. This is how you check whether there is another setup dialog in the background that requires additional input.

1. Start the setup of the Information Server.
Starting the Information Server setup for PCS 7 (Page 38)
Starting the Information Server setup for PCS neo (Page 39)
 2. Configure the Information Server.
Configuring the Information Server (Page 41)
 3. Configure the browser settings before using the Information Server.
Configuring browser settings for the Information Server (Page 42)
 4. Install the Information Server database.
Installing the Information Server database (Page 43)
 5. Install the IS Ready.
Installing IS Ready (Page 46)
-

Note

The installation of the IS Ready is only necessary for PCS 7 / WinCC installations.

6. Configure a project on the Information Server.
Configuring a project on the Information Server (Page 44)

Result

The Information Server is installed.

3.1.3.2 Starting the Information Server setup for PCS 7

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
Check system requirements (Page 30)
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.

Procedure

Note

Depending on the contents of the installation, you might be prompted to restart one or more times during the installation process.

During the installation process, additional setup dialogs can be opened automatically. If the setup does not continue after a while, use the key combination "Alt+Tab" to change the view. This is how you check whether there is another setup dialog in the background that requires additional input.

1. Start the PCS 7 setup from the DVD "PCS 7 V9.1".
 2. Select the setup language.
 3. Read the installation instructions.
 4. Accept the license agreement.
 5. Select the installation content.
-

Note

You can install the Information Server and the IS Ready in the setup simultaneously or separately.

If you want to install Process Historian and Information Server on a system, use the installation package "Process Historian and Information Server".

6. Accept the license agreement.
7. Accept the changes of the system settings.
8. After completion, conclude the setup with a restart.

Result

The setup of the Information Server is started. The "SIMATIC Web Configurator" dialog open.

3.1.3.3 Starting the Information Server setup for PCS neo

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
Check system requirements (Page 30)
- Close all Windows programs before running Setup.

3.1 Installation of the Information Server

- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- Before manually installing the Process Historian/Information Server, the target computer must be configured in the Administration Console:

Note

Configuration of the target computer in the Administration Console

Before manually installing the Process Historian/Information Server, the target computer must be configured in the Administration Console:

1. Install AC Agent via "AdditionalProducts\AC Agent" of the PCS neo setup or a remote installation of the AC agent from the AC Server to the Process Historian-Server/Information Server.
2. Add the Process Historian Server/Information Server to the Administration Console.
3. Create an AC server certificate for the Process Historian Server/Information Server.

To do so, follow the instructions in the PUD for the Administration Console:

- Administration > SIMATIC PCS neo Administration Console > Getting Started > Use cases > Create setup definition for AC agent
- Administration > SIMATIC PCS neo Administration Console > Communication > Adding target computer to AC
- Administration > SIMATIC PCS neo Administration Console > Communication > Use cases > Create certificate for target computer

After successful local installation of Process Historian/Information Server, perform the following advanced steps in the Administration Console:

1. Connect the PH/IS computer to the UMC domain.
2. Determine the inventory data for the PH/IS computer.
3. Update the distribution of the configuration.

Follow the instructions in the PUD: "Administration > SIMATIC PCS neo Administration Console > Inventory > Inventory of target computers"

Procedure

Note

Depending on the contents of the installation, you might be prompted to restart one or more times during the installation process.

During the installation process, additional setup dialogs can be opened automatically. If the setup does not continue after a while, use the key combination "Alt+Tab" to change the view. This is how you check whether there is another setup dialog in the background that requires additional input.

1. In the PCS neo setup, select the installation of the Information Server in the module overview: "SIMATIC PCS neo Information Server".

Note**Selecting installation contents**

Only a combined installation of the Process Historian and Information Server is released for PCS neo.

2. Select the setup language.
3. Select the installation content.
4. Accept the license agreement.
5. Accept the changes of the system settings.
6. After completion, conclude the setup with a restart.

Result

The setup of the Information Server is started. The "SIMATIC Web Configurator" dialog open.

3.1.3.4 Configuring the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- Installation of the Information Server in combination with PCS neo requires a configuration of the target computer in the Administration Console.

Configuration

1. The "SIMATIC Web Configurator" dialog opens.
You see an overview of the configuration procedure.
The "IIS configuration" dialog opens.
2. In the "IIS Configuration" dialog, enter a name under "Application name" or accept the pre-selection, "Information Server".
3. In the "IIS Configuration" dialog, select the option: "Create a virtual directory":

Note

Do not change the default.

4. Confirm with "OK".

3.1 Installation of the Information Server

5. Enter a user name and password in the "Change Service Account" dialog. Leave the box checked if you want the user information to be used for all services.
6. Confirm with "Log on as".
7. After completing the configuration, restart the computer.

Result

The Information Server configuration is complete.

3.1.3.5 Configuring browser settings for the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- During the initial installation, the "Automatic logon with user name and password" option must be selected in your browser under "Options > Internet Options > Security > Privacy Level > User Authentication > Logon".
- The user that you log on to the "Change Service Account" dialog during configuration must have the following rights for each of the following services:
 - Information Server Scheduler: Access to the WebHost database, access to the configured data sources (e.g. PH), permissions to send e-mails
 - Information Server DataHost Service: Access to the configured data sources (e.g. PH)
 - InfSrvPool: Access to the WebHost database, access to the configured data sources (e.g. PH)

Browser settings

Adapt the settings of your browser for the Information Server .

Note

Do not change the following settings until after the initial commissioning of the Information Server.

1. Open the "Internet options" dialog from the Start menu.
2. In the "Internet Properties" dialog, select the "Security" tab.
3. For the current zone, disable the "Enable Protected Mode" setting.
4. Select the zone "Trusted Sites" > "Sites".

5. Add the following Web page to the "Web Pages" list: "https://<CN of the certificate>".

Note**CN of the certificate**

1. Open the "Internet Information Services (IIS) Manager".
 2. Under "Connections" "Sites", select the "Siemens" site.
 3. Select "Edit Site" > "Bindings".
 4. In the "Site bindings" dialog, select the https connection and select "Edit".
 5. Select the SSL certificate and select "Display".
 6. The Common Name can be found in the "Details" < "Subject" tab.
-
6. Select "Privacy Level".
 7. Under "User authentication > Logon", select the "Prompt for user name and password" option in the "Security Settings" dialog.

Result

The browser settings are configured.

3.1.3.6 Installing the Information Server database

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.
- During the initial installation, the "Automatic logon with user name and password" option must be selected in your browser under "Options > Internet Options > Security > Privacy Level > User Authentication > Logon".
- The user that you log on to the "Change Service Account" dialog during configuration must have the following rights for each of the following services:
 - Information Server Scheduler: Access to the WebHost database, access to the configured data sources (e.g. PH), permissions to send e-mails
 - Information Server DataHost Service: Access to the configured data sources (e.g. PH)
 - InfSrvPool: Access to the WebHost database, access to the configured data sources (e.g. PH)

Installation of the Information Server database

1. Open the browser.
2. Enter the previously defined URL in the browser bar or use the Information Server shortcut on the desktop
The Information Server web application opens.
3. From the drop-down list, select a Microsoft SQL Server instance in which the Information Server stores its data.

Note

Adding a database file path

By default, the database files are stored in the SQL directory "Data" (e.g. C:\Program Files\Microsoft SQL Server\MSSQL14.HISTORIAN\MSSQL\DATA).

If you want to select a location, select the "Enter database file path" option and add the destination path.

4. Confirm with "Install or update".
5. When the installation is complete, select "Continue".
6. In the project configuration, select "Add Project".
7. Assign a data source type to the project and confirm with "Continue".
8. Specify a computer name by entering a "Host name" or a "Server IP".
9. Select "Select projects".
10. Select the projects you want to add and enter their names.
11. Select "Add".

Result

A database is installed in the Information Server.

3.1.3.7 Configuring a project in the Information Server

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems: PH Server. Password changes must be tracked in all systems.

- During the initial installation, the "Automatic logon with user name and password" option must be selected in your browser under "Options > Internet Options > Security > Privacy Level > User Authentication > Logon".
- The user that you log on to the "Change Service Account" dialog during configuration must have the following rights for each of the following services:
 - Information Server Scheduler: Access to the WebHost database, access to the configured data sources (e.g. PH), permissions to send e-mails
 - Information Server DataHost Service: Access to the configured data sources (e.g. PH)
 - InfSrvPool: Access to the WebHost database, access to the configured data sources (e.g. PH)

Project configuration in the Information Server

1. Open the administration area of the web application.
2. Open the project configuration.
3. Select "Add project".
4. Assign a data source type to the project and confirm with "Continue".
5. Specify a computer name by entering a "Host name" or a "Server IP".

Note

Integration of the Information Server in PCS neo

In the dialog, enter an alias and the exact host name that is used in the certificate of the PCS neo Portal.

If this name is not entered correctly, the Information Server cannot be successfully integrated into the portal.

6. Select "Select projects".
7. Select the projects you want to add and enter their names.

Note

SIMATIC PCS neo Host Name

Enter here the FQDN name of the PCS neo Engineering station so that you can switch to the Information Server in the PCS neo Engineering Portal.

8. Select "Add".

Result

A project is configured in the Information Server.

3.1.3.8 Installing Information Server Ready

Requirement

- The required hardware and software requirements for the installation of the Information Server are fulfilled.
- Close all Windows programs before running Setup.
- The specified user information must match on the different systems. Password changes must be tracked in all systems.
- For using the IS Ready with Process Historian: The IS Ready Service user must be created as a system administrator on the SQL Server instance.

Installation of the Information Server Ready on the Process Historian computer

1. Open the setup folder.
2. Select the "Start.exe" file of the component to be installed.
3. Select the language.
4. Read the installation instructions.
5. Accept the license agreement.
6. Select the installation content.
You see an overview of the setup for the installation process.
7. The installation is completed.
Restart the system now or at a later time.

Configuration on the Process Historian computer

1. Open "Start > All Programs > Siemens Automation > SIMATIC > IS Ready".
2. Select "IS Ready Configuration".
The "IS Ready Configurator" opens.
3. Select "Next".
4. Enter your logon information.
You see an overview of the setup for the installation process.
5. Select "Finish".

Note

Checking the configuration

The configuration was successful if you have been assigned to the "SIMATIC Reporting Services" group under "Local Users and Groups" on your computer.

Result

Information Server Ready is installed.

3.1.4 Uninstalling

3.1.4.1 Uninstalling the Information Server

Requirement

- An Information Server is installed.

Procedure

1. Go to "Control Panel > Programs and Features".
2. Select the item SIMATIC Information Server.
3. Select the "Uninstall" menu command.
4. Accept the uninstallation.

Result

The Information Server is uninstalled.

Note

During uninstallation, no generated reports or the database are deleted.

3.2 Security information

Siemens provides products and solutions with industrial security functions that support the secure operation of plants, systems, machines and networks.

In order to protect plants, systems, machines and networks against cyber threats, it is necessary to implement – and continuously maintain – a holistic, state-of-the-art industrial security concept. Siemens' products and solutions constitute one element of such a concept.

Customers are responsible for preventing unauthorized access to their plants, systems, machines and networks. Such systems, machines and components should only be connected to an enterprise network or the internet if and to the extent such a connection is necessary and only when appropriate security measures (e.g. firewalls and/or network segmentation) are in place.

For additional information on industrial security measures that may be implemented, please visit

<https://www.siemens.com/industrialsecurity>.

Siemens' products and solutions undergo continuous development to make them more secure. Siemens strongly recommends that product updates are applied as soon as they are available and that the latest product versions are used. Use of product versions that are no longer supported, and failure to apply the latest updates may increase customer's exposure to cyber threats.

3.3 Basics of the Information Server

To stay informed about product updates, subscribe to the Siemens Industrial Security RSS Feed under <https://www.siemens.com/industrialsecurity>.

3.3 Basics of the Information Server

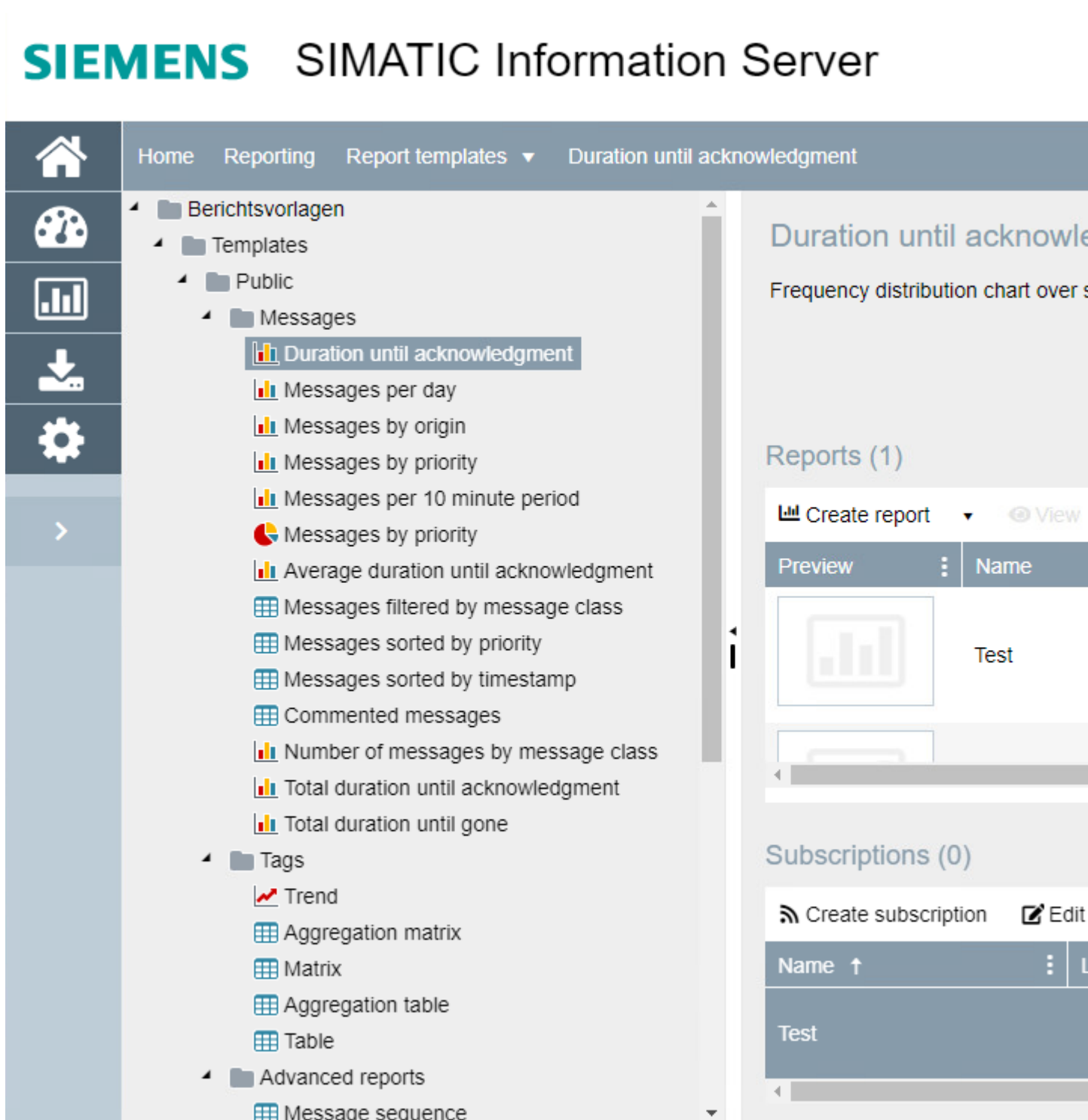
Definition

The SIMATIC information server is a reporting-system which uses the Microsoft Reporting Services and accesses historical data of a process control system.

With the SIMATIC Information Server you can group, evaluate and show the messages, tags and recipe data of a process control system in a table or graphic.

Implementation in the system

The reporting of the web application of the information server is structured as follows:



Reporting (Page 100)

Browser

You access the Web application of the Information Server with one of the following browsers with HTML 5 capability:

- Google Chrome (current version)
- Mozilla Firefox (current version)

Create reports

You can create reports with the following applications:

- Information Server Web application

Web application (Page 50)

Access to project data

You can access project data for which you have received permission.

To access the data you need an existing connection to a Process Historian server.

Project configuration (Page 148)

You can work with the following data sources:

- Process Historian database

Application recommendations

To access the web application proceed as follows:

- Opening a Web application (Page 58)

To create reports or subscriptions, proceed as follows:

- Create reports (Page 112)
- Creating subscriptions (Page 121)

To add projects in the web application proceed as follows:

- Add project (Page 150)

3.4 Basics of the web application

Definition

You define the content of a report by assigning parameters. The report is visualized according to the selected report template, for example, as chart or table.

Reporting (Page 100)

The Information Server processes the following data:

- Messages
- Tags

Creating, editing and displaying reports

You have various options for creating, editing and displaying a report in the Information Server.

- **Preview:**
You create and parameterize a report template to generate a report from it. The report can be displayed in the preview window. You can parameterize frequently used report templates and save them under "Create parameter preset".
- **Create reports:**
Use "Create report" to save the parameterized report templates. You can save the reports in the following formats:
 - PDF
 - XML
 - Microsoft HTML
 - Microsoft Excel
 - Microsoft Word
- **Creating subscriptions:**
Create a subscription for a recurring report. The report is made available to you based on one or multiple defined triggering criteria. Triggering criteria can be, for example, a fixed point in time or a specific event. You can choose from different delivery methods and select the export format.
- **Exporting reports:**
Export saved reports to a network drive to further process the report.

Note

Names shown in italics in the dialogs represent optional information.

Application recommendations

To create or apply parameter settings for a report, proceed as follows:

Creating parameter presets (Page 107)

To create reports or subscriptions, proceed as follows:

- Creating a report (Page 112)
- Creating a subscription (Page 121)

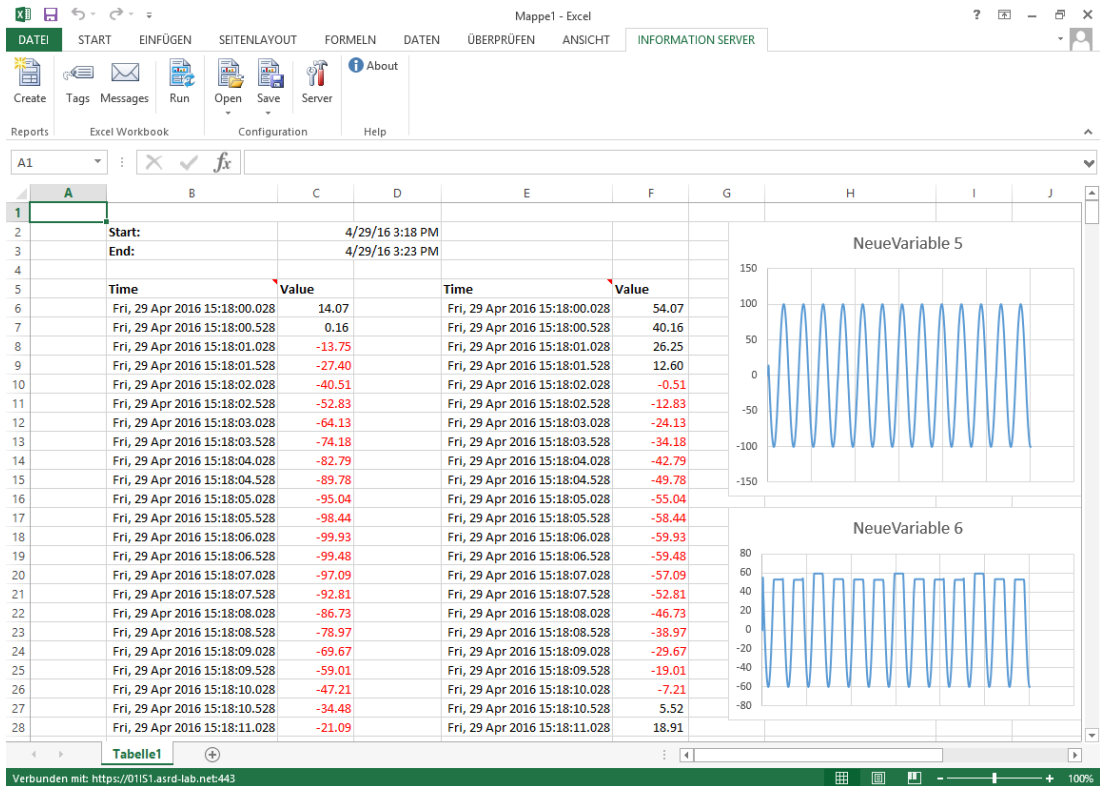
3.5 Basics of the Office Add-In

Definition

The Information Server provides an add-in for the Microsoft Excel application. You can use this add-in to insert and create reports in Excel. A connection to the Information Server must exist to retrieve information for a report. This connection is configured in the add-in under "Configuration > Server".

Implementation in the system

The screenshot below shows examples of messages that are configured in the Office add-in Excel. Some of the data has been visualized in a trend diagram.



Application recommendations

There are two types of reports in the Office add-in:

- Report templates
You can create a report on the Information Server and import it into Excel. Reporting corresponds to the procedure in the Web application of the Information Server.
Creating a report (Page 112)
Creating a subscription (Page 121)
- Excel report templates
You can create report templates for Excel. Process values or messages are inserted into the cells of an Excel worksheet. When relative times are used, you can update the cell contents. You use the Excel functions to process the data. For example, you can use the Excel graphics function to visualize process value trends.
Creating a report in Excel (Page 178)
Creating a subscription in Excel (Page 182)

3.6 Useful information

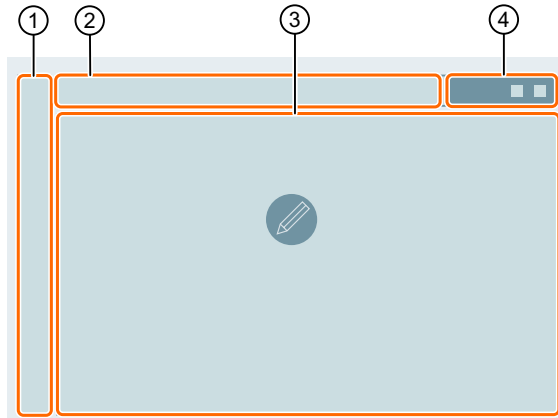
3.6.1 Operating the user interface of the Information Server Web application

Below, reference is made to:

- Layout of the user interface

Layout of the user interface

The user interface contains the following elements:



- | | | |
|---|-----------------------|--|
| ① | Navigation area | Provides access to the individual apps of the Web application. |
| ② | Breadcrumb navigation | Shows the current position in the Web application menu. |
| ③ | Work area | Displays an overview of the individual apps or the work area of an app, depending on its position in the menu. |
| ④ | Header | A global basic element and can be seen in every area. |

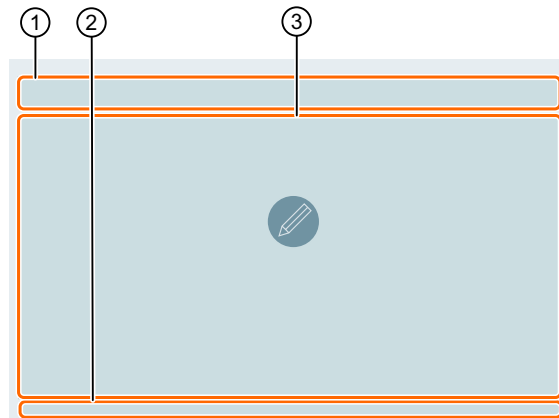
3.6.2 Operating the user interface of the Office add-in of the Information Server

Below, reference is made to:

- Layout of the user interface

Layout of the user interface

The user interface contains the following elements:



- | | | |
|---|-----------|--|
| ① | Toolbar | Provides access to the features in the Office add-ins. |
| ② | Footer | Shows the connection status of the Office add-in. |
| ③ | Work area | Displays the configured data. |

3.7 Web application

3.7.1 Web application

Definition

You access the Web application of the Information Server with a browser with HTML 5 capability:

Layout of the Web application

The Web application consists of the following areas:



SIMATIC Information Server

1

2

3



Home



The following applications are available:



Dashboard

Create dashboard



Download

3.7 Web application

- ① Navigation bar (Page 59)
- ② Breadcrumb navigation (Page 60)
- ③ Work area in the Web application (Page 60)
- ④ Header (Page 160)

3.7.2 Step-by-step instructions

3.7.2.1 Opening a Web application

Requirement

You are a member of one of the following Windows user groups:

- SIMATIC Report Publishers
- SIMATIC Report Users
- SIMATIC Report Administrators

Procedure

1. Enter the URL defined into the browser bar during the installation in the SIMATIC Web Configurator.

Note

Browser selection

Google Chrome is recommended for using the Information Server Web application.

Note

Browser does not display the Information Server Web application

If the browser does not display the Web application of the Information Server, ensure that all software requirements are met. If needed, check the requirements in the installation instructions.

Note

License release by logging off the Web application

If you close the Web application without logging off, the license can remain inactive for 20 minutes until it expires.

Result

The Web application is open.

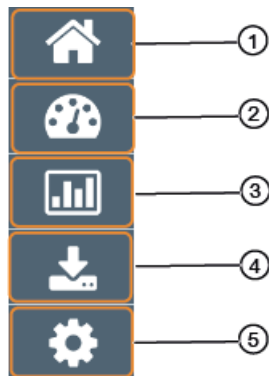
3.7.3 Navigation area

Definition

The navigation area gives you quick access to the main functions, the "apps" of the Web application.

Layout

The navigation area is divided into the following areas:



- ① Start page
 - Overview of the apps
 - Quick access to certain functions of the apps
- ② Dash-board (Page 62)
 - Configurable controls
- ③ Reporting (Page 100)
 - Reporting
 - Subscriptions
- ④ Download (Page 124)
 - Download of the Office add-ins
- ⑤ Adminis-tration (Page 125)
 - App configuration
 - E-mail settings
 - Application Installer
 - Licensing
 - Project configuration
 - User configuration

3.7.4 Breadcrumb bar

Definition

Using the breadcrumb bar you can:

- Navigate
- Trace the current position in the Web application menu with the respective higher-level hierarchy levels all the way to the start page

Structure

The breadcrumb navigation is structured as follows:



- ① Hierarchy level 1: Starting point in the web application
- ② Hierarchy level 2: One of the apps
- ③ Hierarchy level 3: A sub-area of an app

3.7.5 Work area Web application

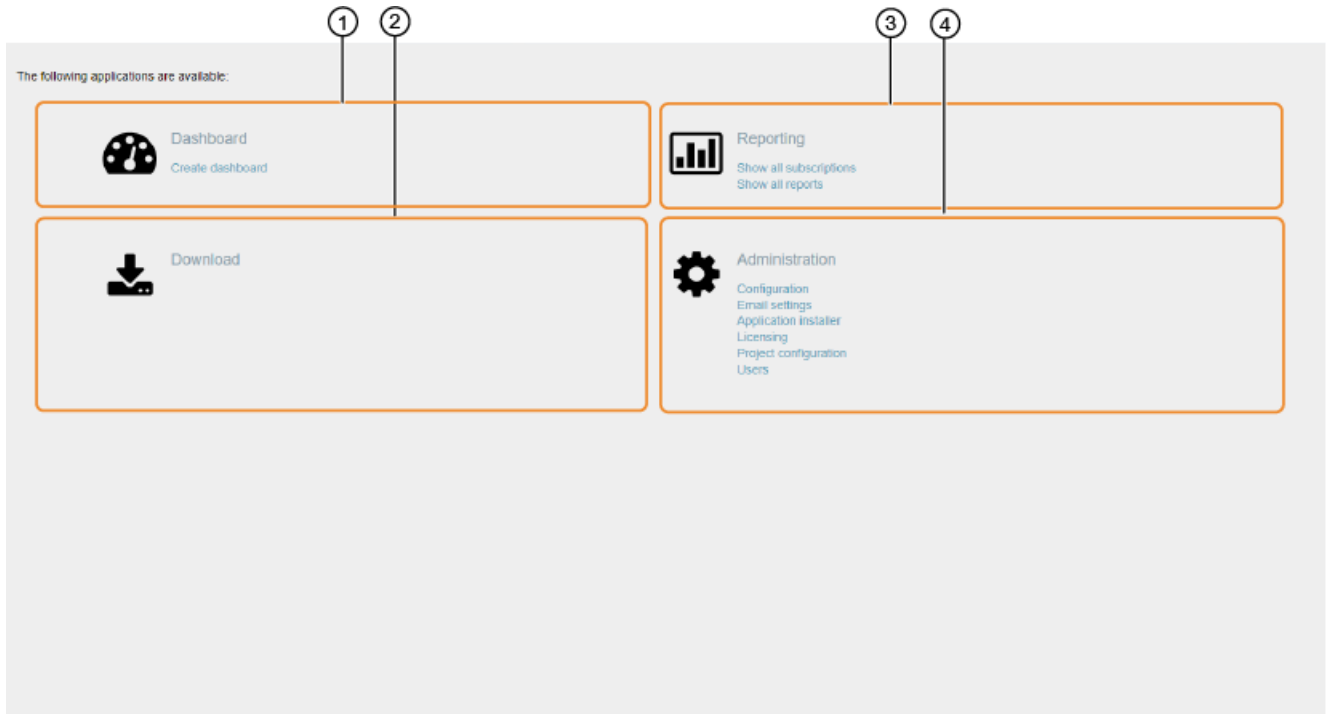
3.7.5.1 Work area in the Web application

Definition

The work area is the main area in the Web application. An overview of the individual apps is shown on the start page. You can select specific contents of the apps directly. The division of the work area can vary within the apps.

Layout

The work area in the web application is divided into the following areas:



- ① Dashboard (Page 62)
- ② Download
- ③ Reporting (Page 100)
- ④ Administration (Page 125)

3.7.5.2 Step-by-step instructions

Opening the work area in the Web application

Requirement

You are a member of one of the following Windows user groups:

- SIMATIC Report Publishers
- SIMATIC Report Users
- SIMATIC Report Administrators

3.7 Web application

Procedure

1. Open the Web application of the Information Server by entering the URL defined during installation into the address bar of the browser.
2. Select an app in the work area.

Result

The work area of the selected app is open.

3.7.5.3 Dashboard

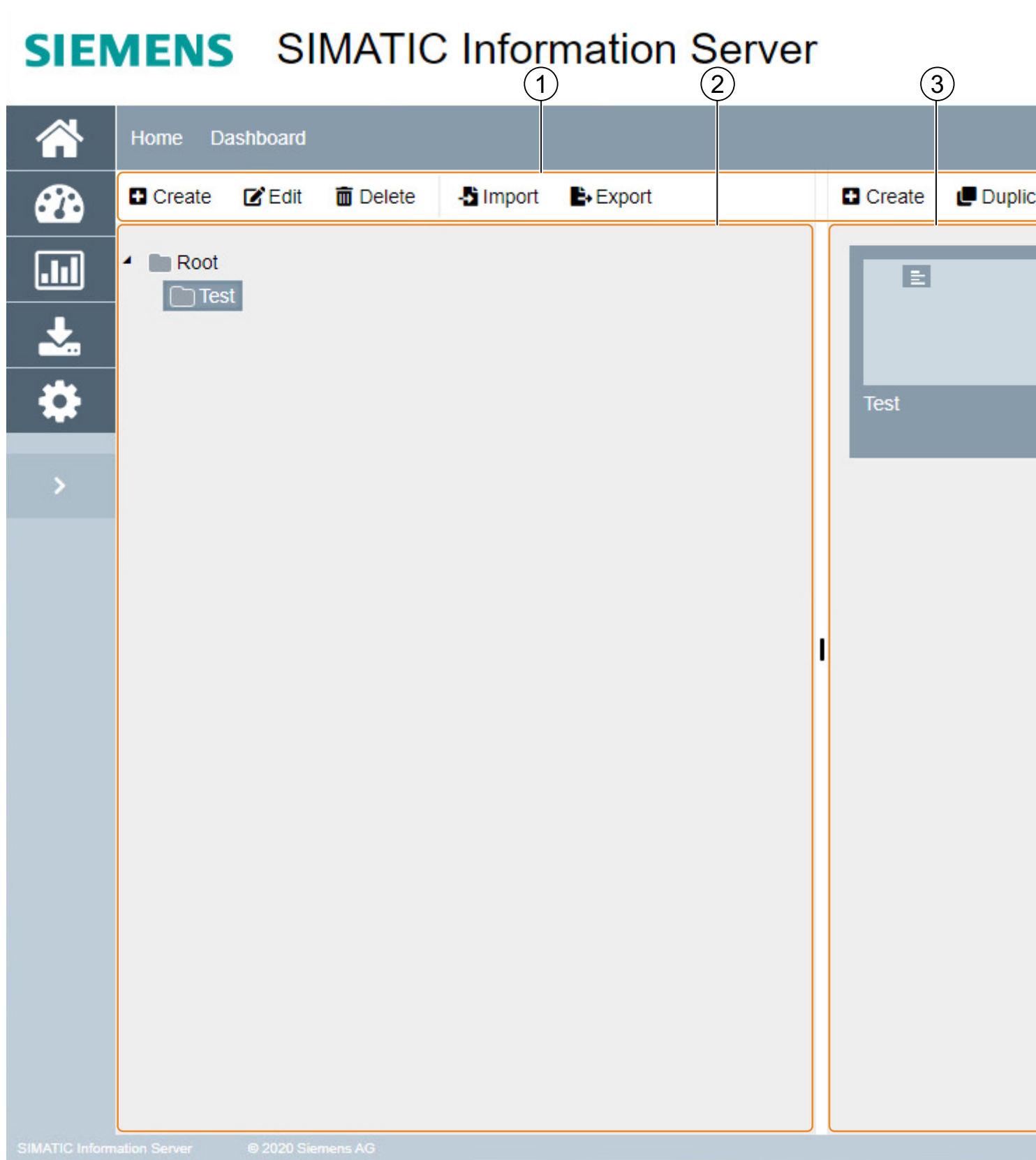
Dashboard

Definition

You can select from different options for data processing within the dashboard based on the configurable controls.

Layout

The "Dashboard" app is structured as follows:



- ① Toolbar (Page 65)
- ② Overview of the folder hierarchy
- ③ Overview of the dashboards already created

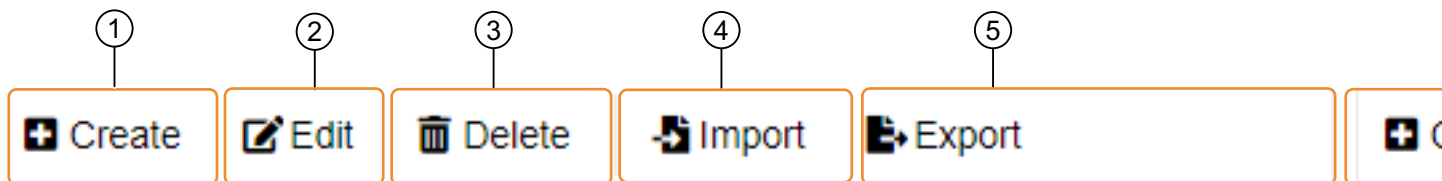
Toolbar in the "Dashboard" app

Definition

The toolbar contains all functions within the "Dashboard" app.

Layout

The "Dashboard" app contains the following functions:



- | | | |
|---|-----------------------------------|--|
| ① | Create folder (Page 66) | Creates a new folder. |
| ② | Rename folder (Page 66) | Opens Edit mode of the selected folder. |
| ③ | Delete folder (Page 67) | Deletes the selected folder. |
| ④ | Import folder hierarchy (Page 67) | Imports a hierarchy. |
| ⑤ | Export folder hierarchy (Page 68) | Exports the current folder hierarchy. |
| ⑥ | Create (Page 68) | Creates new dashboards, dynamically fillable. |
| ⑦ | Duplicate (Page 71) | Duplicates the selected dashboard. |
| ⑧ | View (Page 70) | Opens the selected dashboard for viewing. |
| ⑨ | Edit (Page 70) | Opens Edit mode of the selected dashboard. |
| ⑩ | Delete (Page 71) | Deletes the selected dashboard. |
| ⑪ | Export (Page 72) | Exports the selected dashboard. |
| ⑫ | Sort (Page 72) | Sorts by "Name" or "Last modified" via drop-down menu. |
| ⑬ | Find (Page 73) | Searches via direct entry of the dashboard name. |

Step-by-step instructions

Create folder

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.

Procedure

1. Select "Create Folder".
2. Assign a name.
3. Select "Save".

Result

A folder for dashboards is created.

Renaming folders

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.

Procedure

1. Select the folder you want to rename.
2. Select "Edit".
3. Change the name.
4. Select "Save".

Result

The name of the folder has changed.

Delete folder**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.
- A folder has been created.

Procedure

1. Select the folder you want to delete.
2. Select "Delete".
3. Confirm your selection.

Result

The folder and all the dashboards it contains are deleted.

Import folder hierarchy**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.

Procedure

1. Select "Import folder".
2. Select the file you want to import.
3. Select "Import".

Result

The folder hierarchy is imported.

Export folder hierarchy

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.

Procedure

1. Select the folder you want to export.
2. Select "Export".

Note

To export all dashboards, select the root folder and click the button to confirm the export. The dashboards are created in the specified location with the same folder structure as in the Web application.

Result

The folder has been saved locally in the specified target directory.

Creating a dashboard

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators

Procedure

1. Select "Create".

Note

In contrast to version 2014 SP2, the dynamic dashboard template no longer statically links the controls to the divisions of the selected dashboard. Instead, they can be dragged and dropped to the desired location.

2. Drag-and-drop controls into the dashboard to suit your needs.
Controls (Page 73)
3. Select "Save".

Note

The "Properties" dialog opens automatically when saving for the first time. You can open the dialog at any time using the "Properties" button.

4. Select the properties of the dashboard.
Editing the properties of a dashboard (Page 86)
5. Select one of the master pages created for the dashboard layout.
Master pages (Page 135)

Note**Time filter**

You have the option of creating one or more time filters that you can use to filter for controls within the dashboard. The created filters appear in the header of the dashboard. Filter in dashboards by time

6. Select "Save".

Result

The dashboard is created and appears in the overview of the "Dashboard" app.

See also

Filtering in dashboards by time (Page 86)

Viewing a dashboard

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is created.

Procedure

1. Select the dashboard you want to view.
2. Select "View".

Note

Print function

When you open a selected dashboard with the "View" function, you have the option to print the view. The computer's own dialog opens for this. For a proportional view of the dashboard displayed on the printout, make sure you layout or scale the view and preview it.

Result

The selected dashboard is open in View mode.

Editing a dashboard

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is created.

Procedure

1. Select the dashboard you want to edit.
2. Select "Edit".

Result

The selected dashboard is open in Edit mode.

Duplicating a dashboard**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is created.

Procedure

1. Select a dashboard that you want to duplicate.
2. Select "Duplicate".

Result

The selected dashboard is duplicated.

Deleting a dashboard**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is created.

Procedure

1. Select the dashboard you want to delete.
2. Select "Delete".

Result

The selected dashboard is deleted.

Exporting a dashboard

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is created.

Procedure

1. Select the dashboard you want to export.
2. Select "Export".

Result

The dashboard has been saved locally in the default destination directory.

Sorting an overview of the dashboards

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.

Procedure

1. Select a sorting order for the created dashboards:
 - Name
 - Last modified

Result

The dashboards are displayed sorted according to your selection.

Browsing the overview of the dashboards

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The "Dashboard" app is open.

Procedure

Enter the name of the dashboard you are looking for.

Result

The dashboard you are looking for is displayed in the overview.

Controls

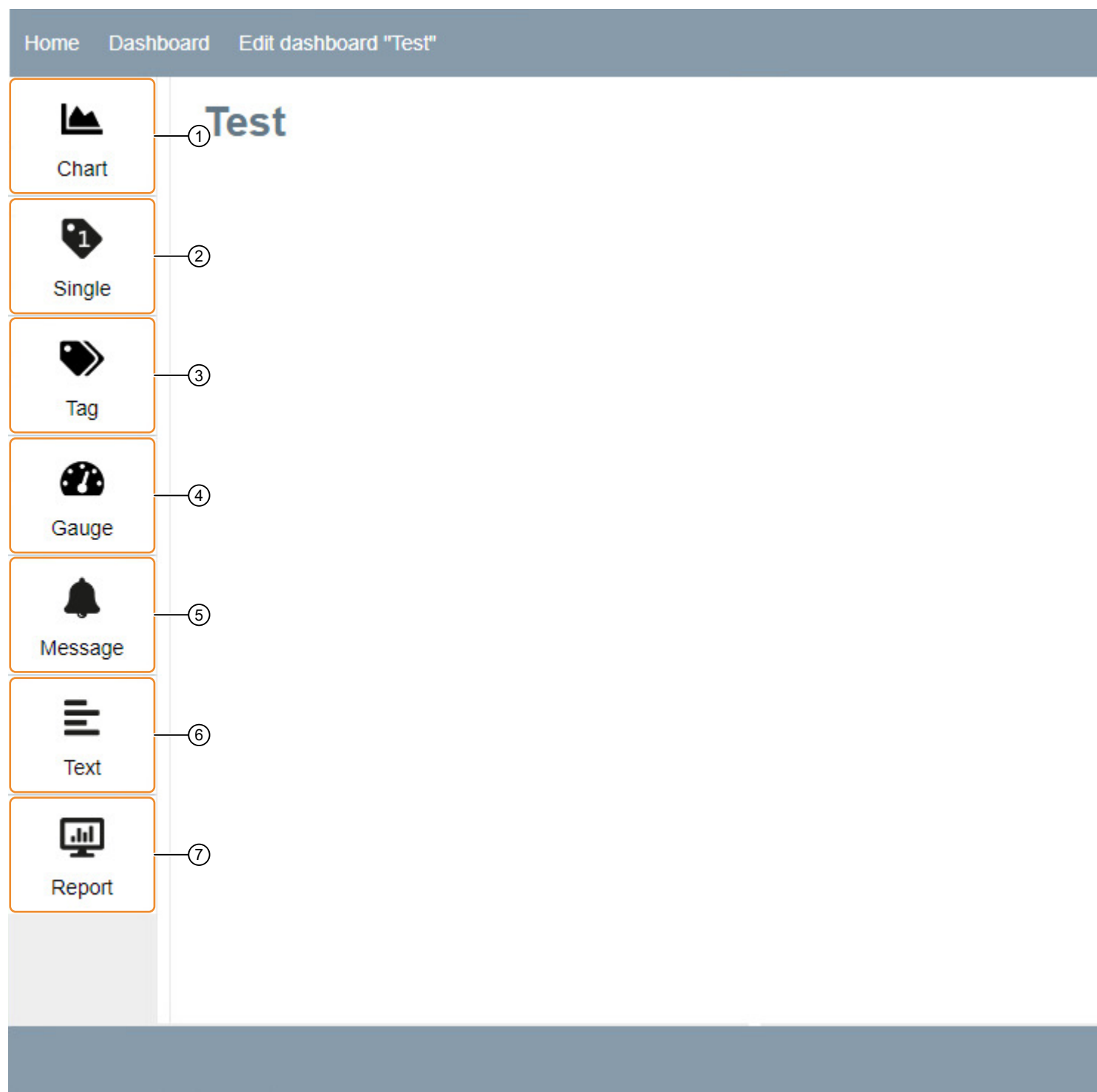
Controls

Definition

Each control processes and displays data differently. The data is visualized faster in the controls than in reporting, because there is no rendering.

Layout

The following controls are available:



- ① "Chart" control (Page 75) Open the dialog for the "Chart" control in the work area using drag-and-drop.

- | | | |
|---|--------------------------------|---|
| ② | "Single" control
(Page 77) | Open the dialog for the "Single" control in the work area using drag-and-drop. |
| ③ | "Tag" control (Page 78) | Open the dialog for the "Tag" control in the work area using drag-and-drop. |
| ④ | "Gauge" control
(Page 79) | Open the dialog for the "Gauge" control in the work area using drag-and-drop. |
| ⑤ | "Message" control
(Page 80) | Open the dialog for the "Message" control in the work area using drag-and-drop. |
| ⑥ | "Text" control (Page 83) | Open the dialog for the "Text" control in the work area using drag-and-drop. |
| ⑦ | "Report" control
(Page 84) | Open the dialog for the "Report" control in the work area using drag-and-drop. |

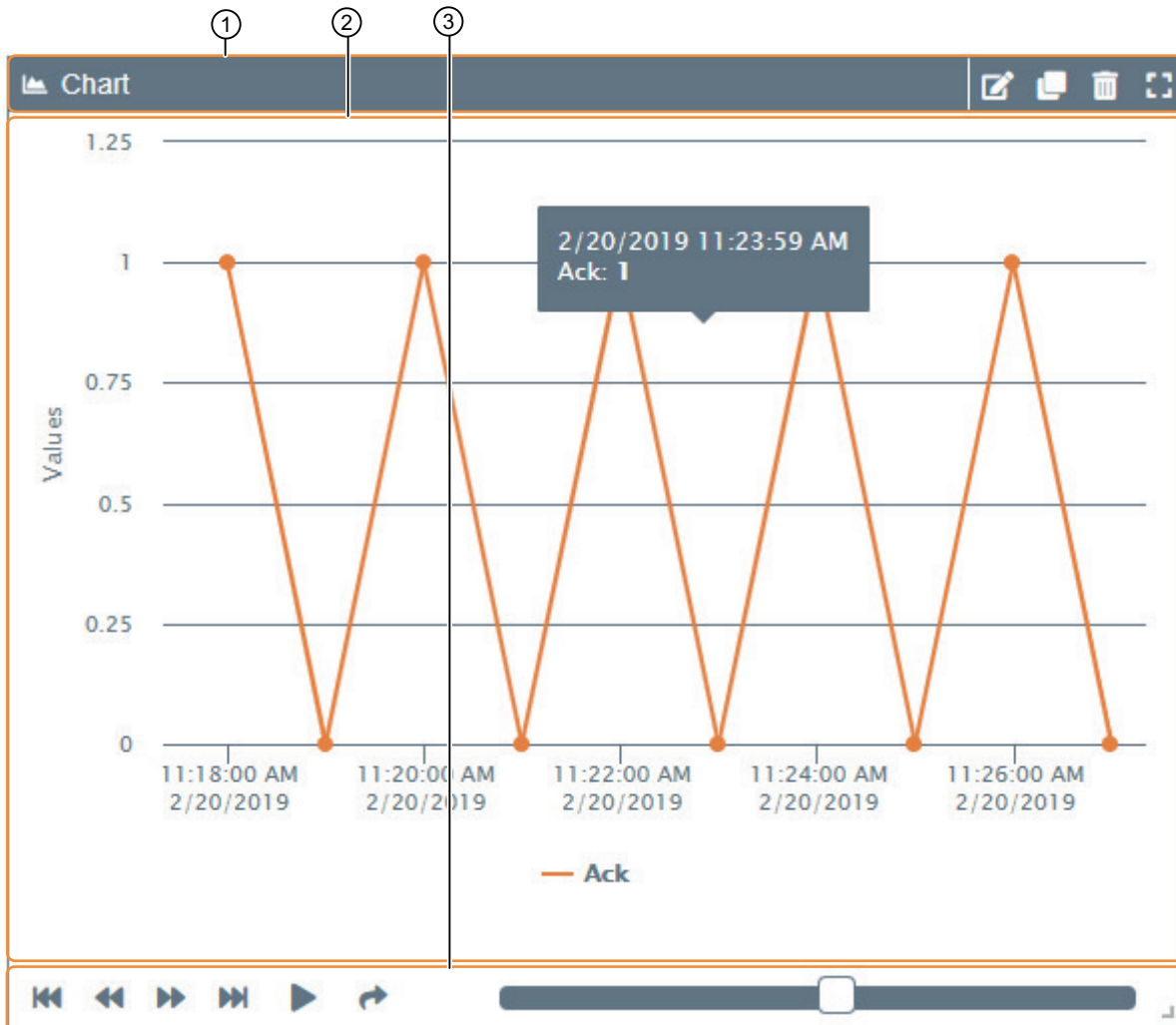
"Chart" control

Definition

You can display historical data or live data over a specific period in a chart using the "Chart" control. You can configure the display of the chart and the individual tags individually.

Layout

The "Chart" control is divided into the following areas:



- | | | |
|---|--------------|--|
| ① | Header | The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen. |
| ② | Display area | The chart is shown in the display area. |
| ③ | Footer | Scroll the table in the footer forwards or backwards. In addition, you have the option of enabling live data or jumping at a specific point in time. |

Data modes

Definition

You can choose from different data modes when configuring the "Chart" control.

Layout

The following data modes are available:

Data mode	Setting
Determine start and end date (chart using a defined start and end time)	<ul style="list-style-type: none"> • Start and end time Selection between: <ul style="list-style-type: none"> – Default: Date and time information – (Relative: Relative time information Time information (Page 102)) – List: Selection of filters already created
Time interval (chart over a time interval)	<ul style="list-style-type: none"> • Start time Selection between: <ul style="list-style-type: none"> – Default: Date and time information – Relative: Relative time information (Time information (Page 102)) – List: Selection of filters already created • Time interval
Live data (chart with live data)	<ul style="list-style-type: none"> • Time interval

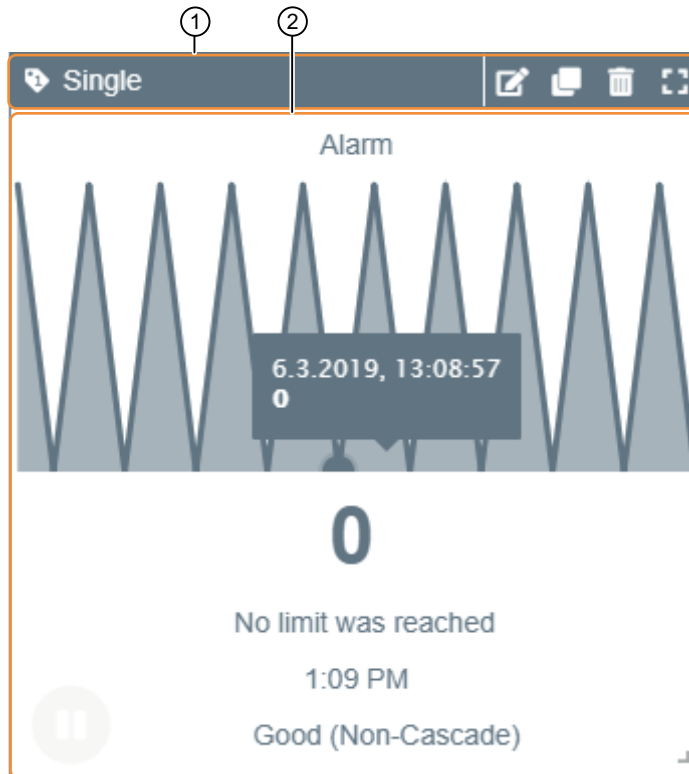
"Single" control

Definition

You can use the "Single" control to graphically display and highlight a tag and its limits.

Layout

The "Single" control is divided into the following areas:



- ① Header The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen.
- ② Display area You can find information on the limit value and its quality code below the graphical display. You can pause or continue the control. When you pause the control, values are displayed at certain intervals, for which the corresponding data is displayed when you mouse-over. If the configured high or low limit is violated, the figure below the graphic takes on the color that corresponds to the limit.

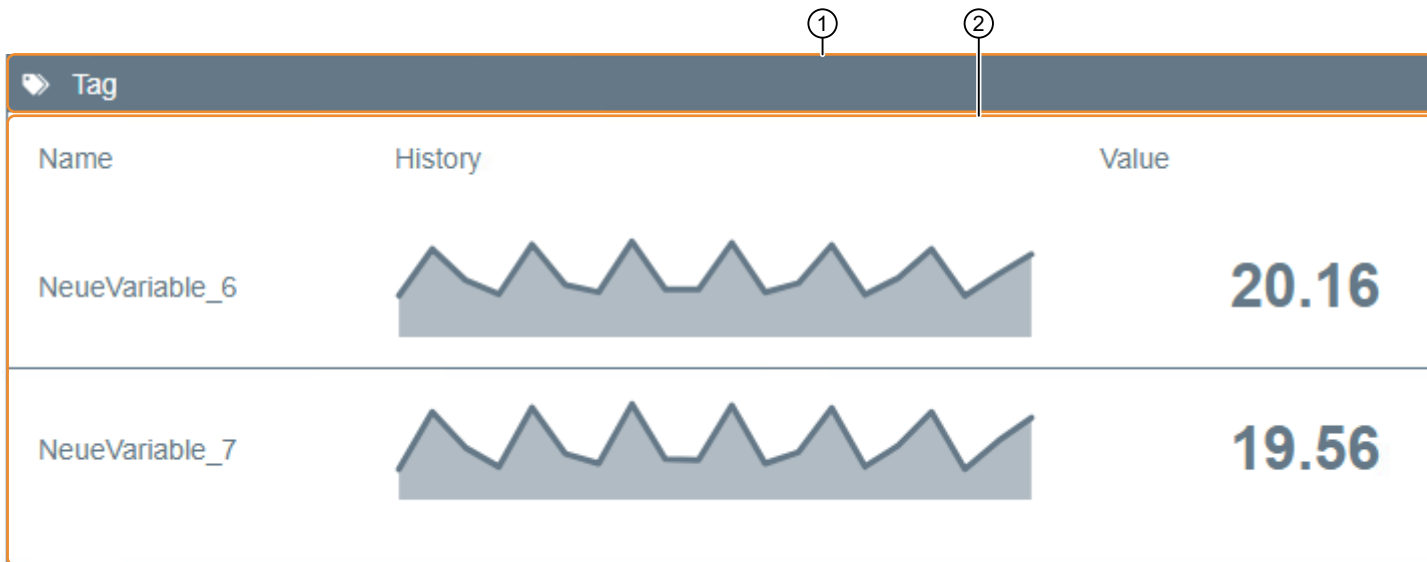
"Tag" control

Definition

Using the "Tag" control, you can display and highlight several tags and their limits in tabular and graphical form.

Layout

The "Tag" control is divided into the following areas:



- ① Header The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen.
- ② Display area
- ③ Footer You can use the "Pause/Play" button to pause or resume the control.

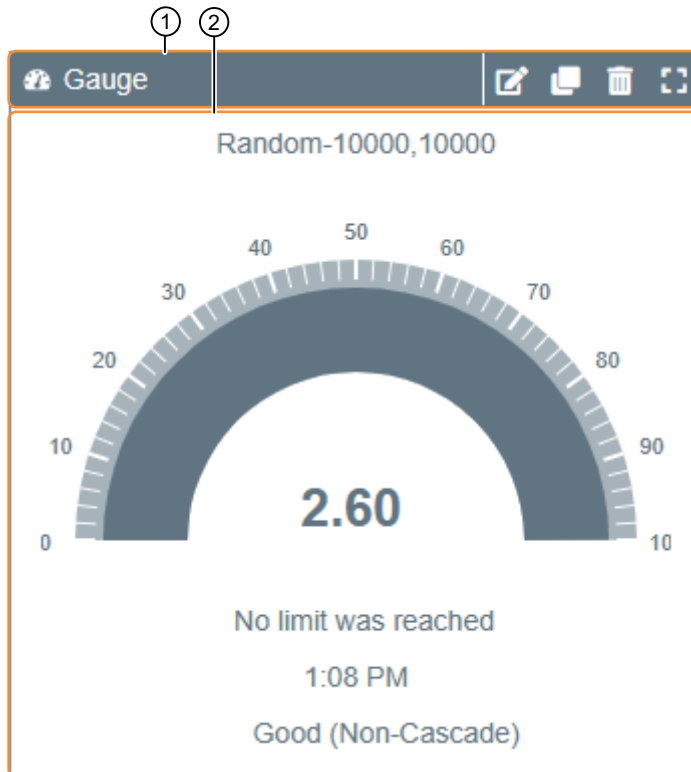
"Gauge" control

Definition

The "Gauge" control enables you to graphically display and highlight a tag and its limits.

Layout

The "Gauge" control is divided into the following areas:



- | | | |
|---|--------------|---|
| ① | Header | The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen. |
| ② | Display area | Below the graphical display you will find information on the limit and its quality code. You can pause or resume the control in the bottom left area. If the configured limit is violated, the figure below the graphic takes on the color that corresponds to the limit. |

"Message" control

Definition

You can use the "Message" control to display a value table that is compiled on the basis of the configured filters. You can add additional attributes to the table.

Layout

The "Message" control is divided into the following areas:

Number	Time ↓	Status	Message text
1	1/18/2021 1:51:24 PM	-	
2	1/18/2021 1:51:23 PM	-	High Limit Value
1	1/18/2021 1:51:22 PM	+	
1	1/18/2021 1:51:22 PM	+	

- ① Header
The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen.
- ② Display area
Table: The values are shown as configured in the display area.
Columns: The columns can be sorted in descending or ascending order using the arrows next to the column names. You can add additional attributes to the table.
- ③ Footer
Scroll the table in the footer forwards or backwards. You can switch between three different views, depending on the data source: Message list (live mode), archive list (archive mode) and hit list (statistical analysis mode).

Filter criteria

Definition

You can select different filter criteria when configuring a "Message" control.

Layout

The following filter criteria are available:

Filter	Setting
Date/time	<ul style="list-style-type: none"> Operators: = / > / ≥ / < / ≤ Select between: <ul style="list-style-type: none"> – Default: Date and time information – Relative: relative time information (see section Time information (Page 102)) – List: Selection from filters already created Input: Character string or numeric, depending on selection
State	<ul style="list-style-type: none"> Operators: = / > / ≥ / < / ≤ Input: Numeric
Number	<ul style="list-style-type: none"> Operators: = / > / ≥ / < / ≤ Input: Numeric
Class	<ul style="list-style-type: none"> Operators: include = / Input: Character string
Type	<ul style="list-style-type: none"> Operators: include = / Input: Character string
AG number	<ul style="list-style-type: none"> Operators: include = / Input: Character string
CPU number	<ul style="list-style-type: none"> Operators: include = / Input: Character string
Computer name	<ul style="list-style-type: none"> Operators: include = / Input: Character string
User name	<ul style="list-style-type: none"> Operators: include = / Input: Character string
Priority	<ul style="list-style-type: none"> Operators: = / > / ≥ / < / ≤ Input: Numeric
Message text	<ul style="list-style-type: none"> Operators: include = / Input: Character string
Fault location	<ul style="list-style-type: none"> Operators: include = / Input: Character string
Block 3 to block 10	<ul style="list-style-type: none"> Operators: include = / Input: Character string
Process value 1 to process value 10	<ul style="list-style-type: none"> Operators: = / equal (text) / include (text) / > / ≥ / < / ≤ Input: Character string or numeric
Name	<ul style="list-style-type: none"> Operators: include = / Input: Character string

Filter	Setting
Area	<ul style="list-style-type: none">• Operators: include = /• Input: Character string
Origin	<ul style="list-style-type: none">• Operators: include = /• Input: Character string
Event message	<ul style="list-style-type: none">• Operators: include = /• Input: Character string
Process value (text) to process value 9 (text)	<ul style="list-style-type: none">• Operators: include = /• Input: Character string

Note

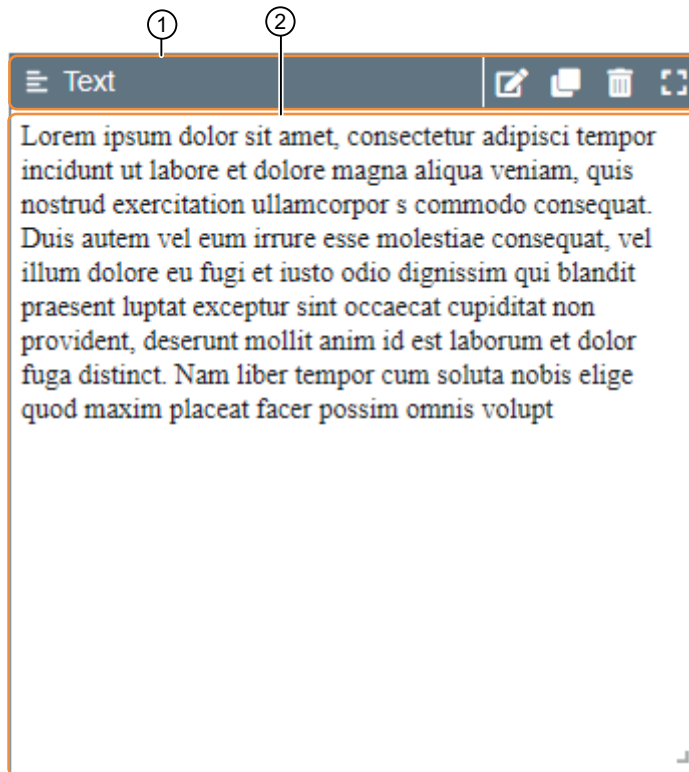
The possible filter criteria vary depending on the project.

"Text" control**Definition**

The "Text" control enables you to record additional information, graphics or links to the data in the dashboard.

Layout

The "Text" control is divided into the following areas:



- ① Header The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen.
- ② Display area The display area shows the integrated information, graphics, etc.

"Report" control

Definition

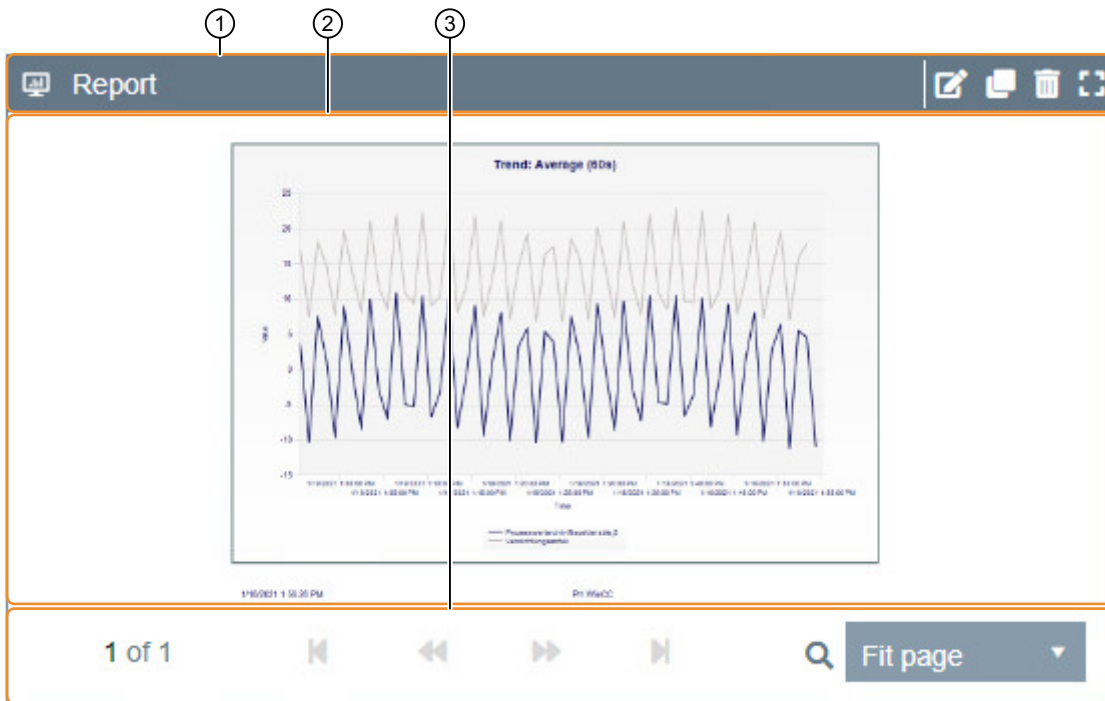
The "Report" control is used to evaluate historical process values using the report templates of the Information Server.

Note

Rendering a report within a "Report" control in a dashboard is faster than in reporting because only one page is rendered at a time.

Layout

The "Report" control is divided into the following areas:



- ① Header The header of the control is continuously visible. In the header, select whether to edit, duplicate, delete, or enlarge the control to full screen.
- ② Display area The process values are displayed as configured in the display area.
- ③ Footer Scroll the table in the footer forward or backward and resize it to fit the size of the control.

Step-by-step instructions for a dashboard

Creating a time filter for a dashboard

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a control is created.

Procedure

1. Open the "Properties" dialog.
2. Select "Add".
3. Assign a name for the time filter.
4. Enter a relative or absolute value by which to filter.
5. Select "Save".

Result

The time filter appears in the header of the dashboard.

Filtering in dashboards by time

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A time filter for the dashboard is created.

Procedure

1. Select the time filter you want to apply in the dashboard header.
2. Select "Apply".

Result

The time filter is applied to the dashboard.

Editing dashboard properties

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Open the "Properties" dialog.
2. Assign a name.
3. Add an optional description.
4. Select a master page for the dashboard.
5. Optionally, select a time filter or create a new time filter.
6. Select "Save".

Result

The properties of the dashboard are edited.

Configuring step-by-step instructions for controls**Configuring "Chart" control****Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Chart" control on the dashboard.
2. Select a project.
3. Select "Add" and select the appropriate tags.
The tags appear in the table.

Note

You can select several tags at the same time. They are automatically assigned different colors in the overview.

4. Select a tag.
5. Select the "Edit" button.
6. If needed, enable an aggregate function and set an aggregation interval.
7. Select the diagram type for displaying the data from the drop-down menu.

8. Activate "Data labeling" if required.

Note

The data label appears in the chart and shows you the data values. The data label can be faded in/out or displayed transparently, i.e. the label is only visible when moving the mouse over the position in the diagram.

9. Configure the display of the diagram and the tag values in the diagram.
10. Select the time and value axes.
11. Repeat the configuration for each tag and confirm with "Save".
12. Configure the appearance of the horizontal and vertical axes in the diagram.

Note

Vertical axis

Specify a minimum and maximum limit for the representation of the data in the diagram. The marking interval can be set automatically or manually.

13. On the "Miscellaneous" tab, configure whether crosshairs are displayed and where the legend is located in relation to the diagram.
14. Select a data mode and make the appropriate settings.
Data modes (Page 76)
15. Select "Save".

Result

A "Chart" control is configured.

Configuring "Single" control

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Single" control on the dashboard.
2. Optionally, enter a title for the control.
3. Select a project.
4. Select one or more tags from the connected archives or edit the selected tag.

5. Select the number of digits displayed.
6. If required, disable the check box for displaying the quality code.

Note

The quality code is activated by default.

7. Configure the display and description of the quality codes in the "Quality Codes" tab.
8. Select "Save".

Result

A "Single" control is configured.

Pausing and resuming "Single" control**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard with a configured "Single" control is open.

Procedure

Select "Play/Pause" to pause or resume the "Single" control.

Result

The "Single" control is paused / continued.

Configuring "Tag" control**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Tag" control on the dashboard.
2. Optionally, enter a title for the control.
3. Select a project.
4. Select tags from a connected archive or edit the selected tags.

Note

In the table, you can specify and activate manual units for the tags. You can assign different colors to them.

5. Select the number of decimal places.
6. If required, disable the check box for displaying the quality code.

Note

The quality code is activated by default.

7. Optionally, enable one or more aggregate functions.
8. Select a time interval.
9. Configure the display and description of the quality codes in the "Quality Codes" tab.
10. Select "Save".

Result

A "Tag" control is configured.

Configuring "Gauge" control

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Gauge" control on the dashboard.
2. Optionally, enter a title for the control.
3. Select a project.
4. Select a tag from a linked archive or edit the selected tag.

5. Select the number of decimal places.
6. If required, disable the check box for displaying the quality code.

Note

The quality code is activated by default.

7. Enter a low and high limit.
8. Select the tick interval.
9. Configure the display and description of the quality codes in the "Quality Codes" tab.
10. Select "Save".

Result

A "Gauge" control is configured.

Configuring "Message" control**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Message" control on the dashboard.
2. Optionally, enter a title for the control.
3. Select one or more projects.
4. Select the number of messages per page.

Note

If you have already configured filters for this control, you can activate/deactivate the created filters here.

5. Select "Add" and between "Only for this dashboard" and "For all dashboards".
 - You create a local filter group with the selection "Only for this dashboard".
 - Select "For all dashboards" to create a global filter group.
6. Configure one or more filters.
Creating a filter group (Page 94)

3.7 Web application

7. Activate the filters you want to apply in this control.
Activating / deactivating a filter group. (Page 94)
8. Select "Save".

Result

A "Message" control is configured.

See also

Showing/hiding columns (Page 96)

Sorting columns in ascending / descending order (Page 97)

Changing views (Page 97)

Configuring "Text" control

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Text" control on the dashboard.
2. Select a title.
3. Enter a text and format the content with the tools in the input window.

Note

You can also insert hyperlinks, graphics and tables here.

4. Disable the "Show header and frame" option if you only want to display the contents of the control.
5. Select "Save".

Result

A "Text" control is configured.

Configuring "Report" control

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Use drag-and-drop to place the "Report" control on the dashboard.
2. Select a title.
3. Select a report template and configure the parameters.

Note

For details on configuration of the individual report templates, see the section "Reporting".
Report generation (Page 109)

4. Select "Save".

Note

Rendering a report as a "Report" control in a dashboard is faster than in reporting because only one page is rendered at a time.

Result

A "Report" control is configured.

Step-by-step instructions for a "Message" control

Creating a filter group

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.

Procedure

1. Enter a name for the filter group.
2. Activate the "Private" option if the filter group should not be visible to all users.
3. Create filters based on the specified criteria.
Filter criteria (Page 81)
4. Select "Add" when you have configured the filter group.

Result

The created filter group appears in the list.

Activate / deactivate filter group

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.
- A "Message" control is open in edit mode and at least one filter has been created.

Procedure

1. In the overview of the filter groups, activate / deactivate the option for the filter group you want to activate / deactivate in the "Activated" column.

Result

The filter group is activated / deactivated.

Editing a filter group**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.
- A "Message" control is open in edit mode and a filter group has been created.

Procedure

1. Select the filter group from the list.
2. Select "Edit".
3. Edit the filter group.
4. Save your changes.

Result

The filter group is processed.

Deleting a filter group**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.
- A "Message" control is open in edit mode and a filter group has been created.

Procedure

1. Select the filter group from the list.
2. Select "Delete".

Result

The filter group is deleted.

Deleting all filter groups

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open.
- A "Message" control is open in edit mode and a filter group has been created.

Procedure

1. Select "Delete all".

Result

All filter groups are deleted.

Showing/hiding columns

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a "Message" control has been configured.

Procedure

1. Open the column settings of the table.
2. Select "Columns".
3. Activate / deactivate the columns you want to show or hide.

Result

The columns are activated / deactivated.

Sorting columns in ascending / descending order

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a "Message" control has been configured.

Procedure

1. Go to the column you want to sort.
2. Select "Column settings".
3. Select "Sort in ascending order" or "Sort in descending order".

Result

The columns are sorted in ascending / descending order.

Changing views

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a "Message" control has been configured.

Procedure

Select the view for the control in the footer:

- Message bar: Live mode
- Archive list: Archive mode
- Hit list: Statistical analysis mode

Result

The contents of the control are displayed in the selected view.

Step-by-step instructions for controls in general

Editing controls

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a control is created.

Procedure

Select "Edit control" in the control.

Result

Edit mode for the selected control opens.

Duplicating a control

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a control is created.

Procedure

Select the "Duplicate control" option in the control.

Result

The selected control is duplicated.

Deleting controls

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a control is created.

Procedure

Select "Delete control" in the control.

Result

The selected control is deleted.

Enlarging controls

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A dashboard is open and a control is created.

Procedure

Select "Enlarge control" in the control.

Result

The selected control is enlarged.

3.7.5.4 Reporting

Reporting

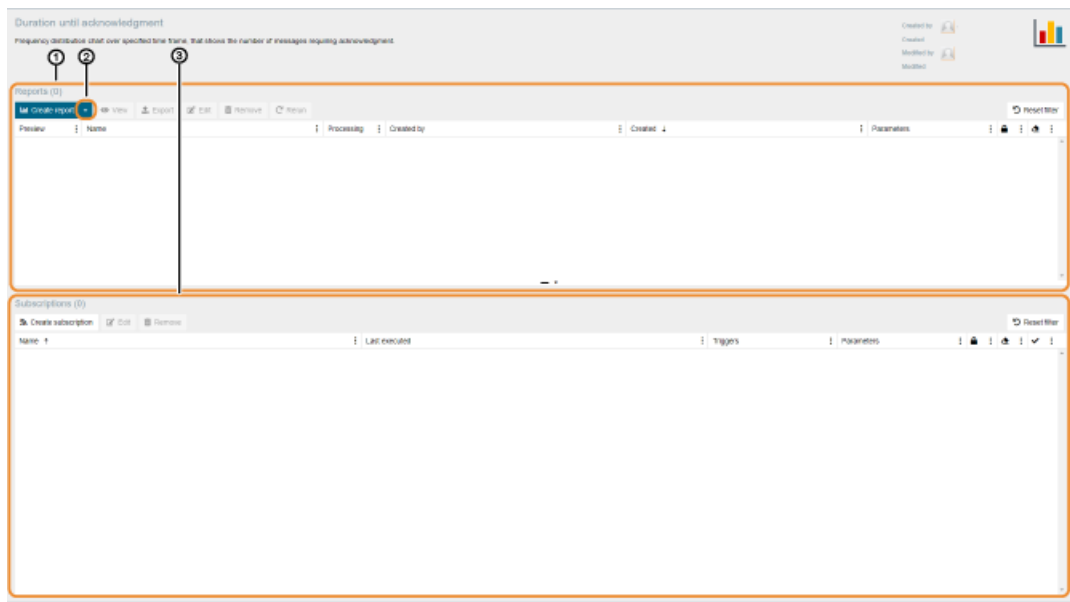
Definition

Based on the Web application, you can create, edit and display reports and subscriptions.

You define the content of the report with the parameter assignment. The report is visualized according to the selected report template, for example, as diagram or table.

Structure

Reporting is subdivided into the following areas:



- ① Report generation (Page 109)
- ② Parameter presets (Page 107)
- ③ Subscriptions (Page 116)

Overview table

The columns in the table are can be shown or hidden. Not all columns are shown by default.

The tables in reporting provide you with an overview of the following information:

Table	Column	Description
Reports	Preview	Preview of the created report
	Name	Name of the report
	Processing	Current editing status
	Created by	User
	Comment	Comment on this report, optional entry
	Created	Date created
	Modified	Date of the last change
	Parameters	Project parameters: Project name, start data, end date, selected message classes
	Private	Depending on its setting, the report is either visible for all users of the Information Server or only for the user who has created the report.
	Cleanup	Indicates as to whether the report is marked for automatic release of storage space.
Subscriptions	Name	Name of the subscription
	Last executed	Date of the last execution
	Triggers	A report is generated and sent based on the specified triggering criteria.
	Parameters	Project name, start data, end date
	Comment	Comment on this report, optional entry
	Created by	User
	Created	Date created
	Modified	Date of the last change
	Private	Depending on its setting, the subscription is either visible for all users of the Information Server or only for the user who has created the subscription.
	Cleanup	Indicates as to whether the subscription is marked for automatic release of storage space.
	Enabled	The subscription is enabled and creates or sends the reports as specified with the triggers.
	Project	Selected project
	Start	Start time
	End	End time

Filter

Depending on the column type in the column header, different filters with up to two conditions per column can be used via the shortcut menu.

Sorting

The columns can be sorted in ascending or descending order using the shortcut menu.

Time information

Definition

The time specifications define for reports:

- The start and end date
- A time period in which the data is accessed to evaluate the report.

The Information Server allows you to enter absolute and relative times.

Note

Time data in different time zones

If the Information Server and Information Server Client are in different time zones, the reports display the local time of the Information Server.

The inputs in the Information Server Client are in the local time of the client.

The local time of the client is always displayed in the Excel AddIn.

Example: The IS client is running in Germany (UTC+1), the IS server is running in China (UTC+8). The output of the query in the Excel Add-In is in UTC+1.

Exception

When using the "Create" or "Insert" options, the server time is displayed in the report.

Absolute time information

Absolute time information describe a specific point in time.

The following table shows possible absolute times:

Absolute time information	Time unit	Web application
dd.mm.yyyy hh:mm:ss	Date with time	✓

The following table shows examples of absolute times:

Example	Description
12/08/2012	Specified date
12.08.2012 14:30:00	14:30 on the specified date

Relative time information

Relative time information is a placeholder for a time interval. The time interval does not have an absolute start and end time. The relative time requires a reference time.

The reference time can be absolute or relative. If a plus sign precedes the relative time, the specified time interval is after the reference time. If a minus sign precedes the relative time, the specified time interval precedes the reference time.

The following table shows regular relative times:

Relative time information	Time unit	Web application
ms	Millisecond	✓
s	Second	✓
m	Minute	✓
h	Hour	✓
d	Day	✓
w	Week	✓
mo	Month	✓
y	Year	✓

The following table shows separate relative times:

Relative time information	Time unit	Web application
t	Current day	✓
y	Yesterday	✓
*	Current time	✓
1-31	1st-31st of the current month	✓

Special feature of the relative time "y":

The relative time "y" denotes both a "year" and a "yesterday". The context in which "y" is used decides the relative time specification:

- "y" at the beginning of a time span: "y" represents the relative time specification "yesterday".
- "y" in connection with a number: "y" stands for the relative time specification "year".

Special feature of the relative time "1-31":

The relative time "1-31" contains all numbers between 1 and 31.

If one of these numbers is not used in direct connection with another relative time, the number stands for this day of the month.

The following table shows examples of relative times:

Example	Description
12.08.12 10:00:00+1d-2h+30m	12.08.12 10:00 plus 1 day minus 2 hours plus 30 minutes
*-24h+25m	Current time minus 24 hours plus 25 minutes
d-3h	00:00 of the current day minus 3 hours
*-2y-3mo	Current date minus 2 years minus 3 months
y-15h	Yesterday minus 15 hours
12	The 12th of the month

Note

Using relative time information

The use of relative times is especially useful in reporting for subscription reporting. Cyclic reports can be generated using relative time information.

Example: The production committee of the early shift is to be represented. Have the report generated for your subscription every day at 15:00 and enter *-9h and end time * as the start time.

Browsing tags

Browsing tags

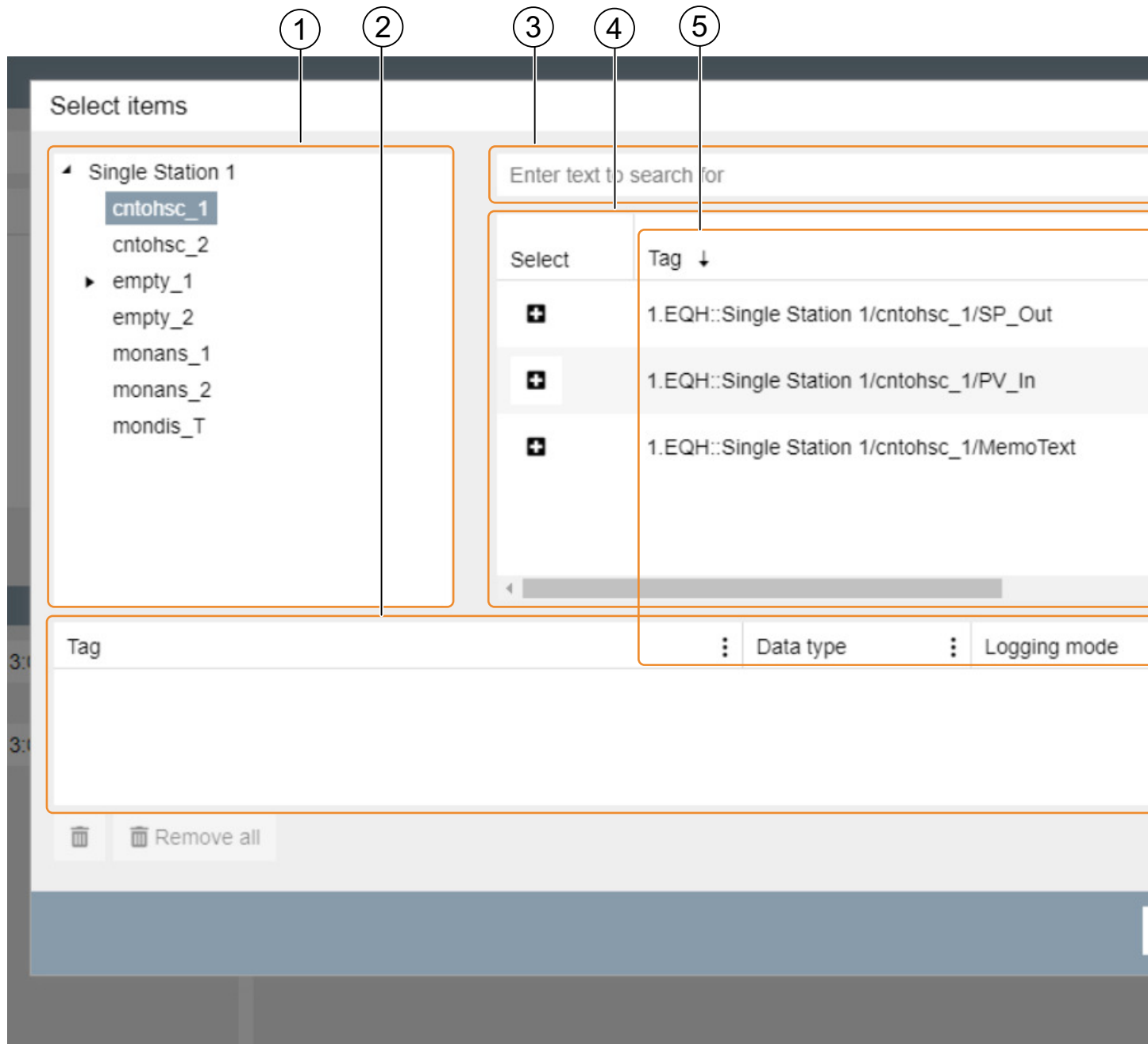
Definition

The dialog for browsing tags can be called from the following situations:

- When creating reports with tags
- When creating subscriptions with tags

Structure

The dialog for browsing tags is structured as follows:



- ① Tag hierarchy with directories and subdirectories
- ② Table with the selected tags
- ③ Search for tags
- ④ Overview of the tags in the selected directory
- ⑤ Sorting and table modification

Filtering and display

Sorting and table modification

Open the shortcut menu of the table from the options in the table header. The tables can be sorted in ascending or descending order and columns can be shown or hidden.

Search for tags

When a search term is entered, the directory selected in the tag hierarchy is searched. If no directory or subdirectory is selected, the tag search is performed in all directories. If a directory is selected but the search should be performed in all directories, clicking in the empty area in the tag view restores the status. The search term must be contained as part of the tag name. Search entries consisting of multiple words are not permitted.

Step-by-step instructions

Browsing tags

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- The "Create report" or "Create subscription" dialog opens for a report template for tags and a project is selected.

Procedure

1. Open the dialog for tag selection.
2. Open the tag hierarchy to expand the directories and subdirectories.
3. Select the directory from which you want to add one or more tags.
4. Select the tags you want to add from the directory overview.

Note**Filtering the tags**

For more information on filtering the tags within this dialog, refer to "Browsing tags (Page 104)"

5. Save your selection.

Result

The selected tags are added.

Parameter defaults

Parameter presets

Definition

Parameter presets are saved templates that contain pre-configured report templates and can be used for additional reports.

Creating parameter presets saves you from having to repeatedly enter the relative time specification as well as the project selection.

Step-by-step instructions

Creating parameter preset

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.

Procedure

1. Select the desired report template from the templates.
2. Select "Create report".
3. Parameterize the report.
4. Select "Create parameter presets".
5. Select a name.
6. If you only want to make the presets visible to yourself, enable the "Private" option.

Note

Users of the "SIMATIC Report Administrators" group can view all templates, including private ones.

7. Select "Save".

Result

The parameter preset has been created.

Reusing parameter preset

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A parameter preset has been created.

Procedure

1. From the folders, choose a report template for which you are creating a new report and for which you have already created a parameter preset.
2. Open the drop-down list.
3. Assign a name for the preset you are using.

Result

The parameter presets are reused and the "Create report" dialog opens with the stored presets.

Editing parameter preset

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A parameter preset has been created.

Procedure

1. From the folders, choose a report template for which you have already created parameter presets.
2. Open the drop-down menu "Create report".
3. Select "Manage presets"
4. Select the parameter preset that you want to edit.

5. You can edit, delete, or move the saved presets up and down.
6. Select "Save".

Result

The saved parameter presets have been edited.

Report generation

Report generation

Definition

Report creation templates are divided into message templates, tag templates, and advanced report templates. Depending on the template, the representation varies between different chart forms or a table. The supplied templates are intended as templates for your templates and do not represent finished report templates. They provide an overview of the report creation functions.

How to configure the report templates or how to create folders, for example, is described under Report generation toolbar (Page 111)

Note

Generating an online preview for reports with many pages

When generating an online preview for reports with many pages, the displayed number of maximum pages per page function may temporarily not match the number displayed in the report.

The behavior is caused by the generation method of the preview graphics; due to the scaling, only up to 1000 pages are generated in each step. To make the first pages available faster, the first step only contains 25 pages.

Templates for messages

Template	Representation
Duration until acknowledgment	Bar chart
Messages per day	Bar chart
Messages by origin	Bar chart
Messages by priority	Bar chart
Messages per 10 minute period	Bar chart
Messages by priority	Pie chart
Average duration until acknowledgment	Bar chart
Messages filtered by message class	Table
Messages sorted by priority	Table
Messages sorted by timestamp	Table

Commented messages	Table
Number of messages by message class	Bar chart
Total duration until acknowledgment	Bar chart
Total duration until gone	Bar chart

Templates for tags

Template	Representation
Trend	Line chart
Aggregation matrix	Table
Matrix	Table
Aggregation table	Table
Table	Table

Note

Using aggregates

Aggregates are easier to process than raw values because they can be displayed faster and produce less load. Especially when creating reports over a longer period of time, a trend is better recognized via aggregates than via raw values.

Note

FAQ: Creation of report templates for the Information Server on data basis of the Process Historian

This application example describes the basics and principle of operation of the Process Historian (PH) and the Information Server (IS). The example describes how to create individual reports in order to be able to promptly read out data from the PH database. In addition, you learn how to work with the Process Historian database.

Link to FAQ (<https://support.industry.siemens.com/cs/document/64906050/creation-of-report-templates-for-the-information-server-based-on-process-historian-data-in-the-wincc-and-pcs-7-environment?dti=0&dl=en&lc=de-DE>)

Templates for advanced reports

Template	Representation
Message sequence	Table
Analog table	Table
Analog interval	Table
Analog intervals, detailed	Table
Analog sequence	Table
Operation sequence	Table
Operating hours	Table
Switching cycle	Table
Trend	Line chart

Note**Templates for "Operating hours" and "Switching cycle"**

The "Operating hours" and "Switching cycle" report templates only work with the "cntohsc" counter blocks from the PCS neo standard component library.

Templates for alarm statistics

Template	Representation
Messages per time interval	Table
Messages by area	Table
Messages by message class	Table
Messages by quantity	Table
Messages by state	Table
Chattering messages	Table
Messages per day	Table
Messages by priority	Table

Report generation toolbar**Definition**

The reporting toolbar contains all functions with which you can edit reports.

Layout

The following functions are available:



- | | | |
|---|--------------------------|--|
| ① | Create report (Page 112) | Creates a new report. |
| ② | View report (Page 112) | Opens the selected report in the view mode. |
| ③ | Export report (Page 113) | Exports the selected report. |
| ④ | Edit report (Page 114) | Opens edit mode of the selected report. |
| ⑤ | Remove report (Page 114) | Removes the selected report. |
| ⑥ | Update (Page 115) | Updates the overview of the created reports. |

Step-by-step instructions

Creating a report

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.

Procedure

1. Select a report template.
2. Select "Create report".
3. Parameterize the report template
4. Select "Create report".

Note

Time information

For report creation, you can enter absolute and relative time information by enabling the "Standard" or "Relative" option under "Time range". The selectable time specifications and examples can be found in "Time specifications" (Page 102).

Result

A report has been created.

Viewing a report

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A report has been created.

Procedure

1. Select the report in the table.
2. Select the "View".

Result

The report is shown in the display mode.

Export report**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A report has been created.

Procedure

1. Select the report in the table.
2. Select "Export".

Note**Multiselection**

Using the "Ctrl+Shift" key combination, you can select several reports in the overview at the same time and export them as a .zip file using the "Export" button.

Result

The report is exported.

Note

The file name contains the date and time of the report generation.

Edit report

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A report has been created.

Procedure

1. Select the report in the table.
2. Select "Edit".
3. Make your changes.
4. Select "Save".

Result

The report has been edited and saved.

Remove report

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A report has been created.

Procedure

1. Select the report in the table.
2. Select "Remove".
3. Select "Yes".

Note**Multiselection**

Using the "Ctrl+Shift" key combination, you can select several reports in the overview at the same time and remove them simultaneously using the "Remove" button.

Result

The report is removed.

Run report again**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A report has been created.

Procedure

1. Select the report in the table.
2. Select "Repeat".

Result

The report is run again and appears in the overview.

Reset filter**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- One or more filters have been parameterized for the table.

Procedure

1. Select "Reset filter".

Result

The filtering in the table is reset.

Time limit for creating reports

Definition

By default, a time limit is defined for creating reports, which after the defined time interval interrupts the creation of reports.

You can extend the time limit to prevent an interruption caused by the time limit when creating particularly large reports.

To do this, follow the instructions on the following Internet site: <https://technet.microsoft.com/en-us/library/jj969577.aspx> (<https://technet.microsoft.com/de-de/library/jj969577.aspx>)

Note

Pay special attention to the sections "Specify the report execution time-out period" and "Specify the user session time-out period". You can adjust the time limit for one report or for all reports.

Subscriptions

Subscription

Definition

A subscription is a regularly recurring report that according to set parameters:

- retrieves data
- evaluates data
- triggers reports when a specified event occurs

For the subscription, relative times are used, with which you can compare certain data, for example, weekly or monthly.

Authorization matrices for subscriptions

Authorization matrix for public subscriptions:

User	Read	Write	Delete
Owner	Yes	Yes	Yes
Administrator	Yes	Yes	Yes
Publisher	Yes	Yes	Yes
User	No	No	No
Viewer	No	No	No

Authorization matrix for private subscriptions:

User	Read	Write	Delete
Owner	Yes	Yes	Yes
Administrator	Yes	Yes	Yes
Publisher	No	No	No
User	No	No	No
Viewer	No	No	No

Subscriptions toolbar

Definition

The toolbar contains all functions for configuration of subscriptions.

Structure

The following functions are available:



- ① Create subscription (Page 121) Creates a subscription.
- ② Edit subscription (Page 122) Opens edit mode of the selected subscription.
- ③ Remove subscription (Page 123) Removes the selected subscription.

Trigger for subscriptions

Definition

Triggers are pre-defined events which have to occur to ensure that a pre-defined action is initiated.

Subscriptions can be triggered by:

- Time trigger
- Tag trigger
- Message trigger

Note

Tag and message triggers can only be used for PCS 7 OS and WinCC OS.

Time trigger

One or more fixed times trigger the subscription.

One-off time trigger

This time trigger is only initiated once at a specified point in time.

Recurring time trigger

Recurring time triggers are initiated cyclically by defined time parameters.

The following recurring triggers can be configured:

- "Daily" frequency:

Selection	Description
Daily	Enter number
Frequency per day	"Once" or "Recurring"
Frequency per day > Once	Select time of day
Frequency per day > Recurring	<ul style="list-style-type: none"> • Specify delay per minute or hour • Define start, optionally also end

- "Weekly" frequency:

Selection	Description
Weekly	Enter number
Weekday	Select day of week, multiselection possible
Frequency per day	"Once" or "Recurring"
Frequency per day > Once	Select time of day
Frequency per day > Recurring	<ul style="list-style-type: none"> • Specify delay per minute or hour • Define start, optionally also end

- "Monthly" frequency for an "Absolute" offset:

Selection	Description
Offset	"Absolute"
Day of the month	Between 1 and 31
Monthly	Enter number
Frequency per day	"Once" or "Recurring"
Frequency per day > Once	Select time of day
Frequency per day > Recurring	<ul style="list-style-type: none"> • Specify delay per minute or hour • Define start, optionally also end

- "Monthly" frequency for a "Relative" offset:

Selection	Description
Offset	"Relative"
Week of the month	Select week: First, Second, Third, Fourth or Last
Weekday	Select week of the month
Frequency per day	"Once" or "Recurring"
Frequency per day > Once	Select time of day
Frequency per day > Recurring	<ul style="list-style-type: none"> • Specify delay per minute or hour • Define start, optionally also end

Note

Full-day recurring subscriptions

If you want to create a subscription that generates recurring reports around the clock, define 00:00 as the start time.

Tag trigger

The selected tag triggers the subscription.

Select one of the following event types for the tag:

- Upon change
- High limit
- Low limit
- High and low limit

Note

Corresponding tag trigger

When creating a subscription for a tag, you can add a corresponding tag trigger to your defined parameters in the "Create subscription" dialog. This appears in the "Trigger" tab.

Message trigger

The selected message triggers the subscription.

Delivery method

Definition

Select one of the various delivery methods for the created subscription in the "Delivery method" tab.

Layout

The following options are available:

- Only in the database: The report is only saved in the database.
- Folder: The report is saved locally or via a network share in the folder.

Note

Parameter %-ts%

The file name in the target folder consists of the specified file name and the timestamp. If no file name is specified, the name of the subscription and the timestamp is used. The reports are saved to the target folder after triggering the specified trigger.

If the file should always be overwritten with the current report, the following key must be added to the file name: <file name>%-ts%

The key only replaces the file in the target folder.

- E-mail: This e-mail contains the report as an attachment. The priority of the e-mail is set to "Normal" by default.
- E-mail (link): This e-mail contains a link to the report in the specified target directory.

Note

Delete after delivery

If you select the option "Delete after delivery", the report is deleted from the database after successful delivery. The "Online report" option can be disabled automatically.

Settings for subscriptions

Definition

When creating a subscription, you can make settings relating to privacy, delivery or use of storage space.

Settings

Setting	Description
Private	If you disable the option, all users of the Information Server can access the subscription.
Enabled	If you disable the option, the subscription can no longer provide reports.
Online report	If you disable the option, no online report can be generated that can be displayed in the Web browser. This reduces the load on the report server and therefore less storage space is used in the database. To display the report you have to download the report.
Clean up reports	Provides the reports for cleanup if too little storage space is available in the database.

Step-by-step instructions

Creating a subscription

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.

Procedure

1. Select the report template for which you are creating the subscription.
2. Under "Subscriptions", navigate to "Create subscription".
3. Enter a name for the subscription.

Note

Text fields whose names are shown in italics are optional.

4. Disable the following settings as required:
Settings for subscriptions (Page 120)

5. Select the parameters for the subscription.

Note

Corresponding tag trigger

When creating a subscription for a tag, you can add a corresponding tag trigger to your defined parameters in the "Create subscription" dialog. This appears in the "Trigger" tab. This replaces steps 6 to 8.

6. Select the "trigger" tab.
7. Open the list of triggers with "Add".
8. Use the triggers to specify when the reports are created.
Trigger for subscriptions (Page 118)
9. Select the export format. The following formats are available:
 - PDF
 - Microsoft Excel
 - Microsoft Word
 - XML
 - Microsoft HTML
10. Define the report parameters in the "Parameter" tab.
11. Select a transmission method in the "Transmission method" tab.
Transmission method (Page 120)
12. Select "Save".

Result

The subscription is created and appears in the list.

Edit subscription

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A subscription has been created.

Procedure

1. Select the subscription you want to edit in the list of subscriptions.
2. Edit the subscription.
3. Select "Save".

Result

The subscription has been edited.

Deleting a subscription**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- A subscription has been created.

Procedure

1. Select the subscription you want to delete in the list of created subscriptions.
2. Select "Delete subscription"

Note**Multiselection**

You can use the Ctrl+Shift key combination to select multiple subscriptions and the "Delete" button to delete them simultaneously.

Result

The subscription is deleted.

Reset filter

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- "Reporting" > "Report templates" > "Templates" is open.
- The table with subscriptions is filtered.

Procedure

In the "Subscriptions" area, select "Reset filter".

Result

The filters in the table are reset and all subscriptions created are displayed unfiltered.

3.7.5.5 Download

Office add-in

Download of the Microsoft Office add-in to the computer is a prerequisite for adding the reports in Microsoft Excel, and for creating and editing reports in Excel.

There are two options:

- You have already installed the Microsoft Office add-in when you installed the SIMATIC Information Server.
- You install the add-in directly from the Web application via the "Download" app.

Note the requirements for the installation.

Step-by-step instructions

Download Office add-in from the Web application

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The requirements for installing the Office add-in are met.

Procedure

1. Open the "Download" application.
2. Select "Download".
3. Follow the installation instructions in the setup.

Result

The Office add-in has been installed.

3.7.5.6 Administration

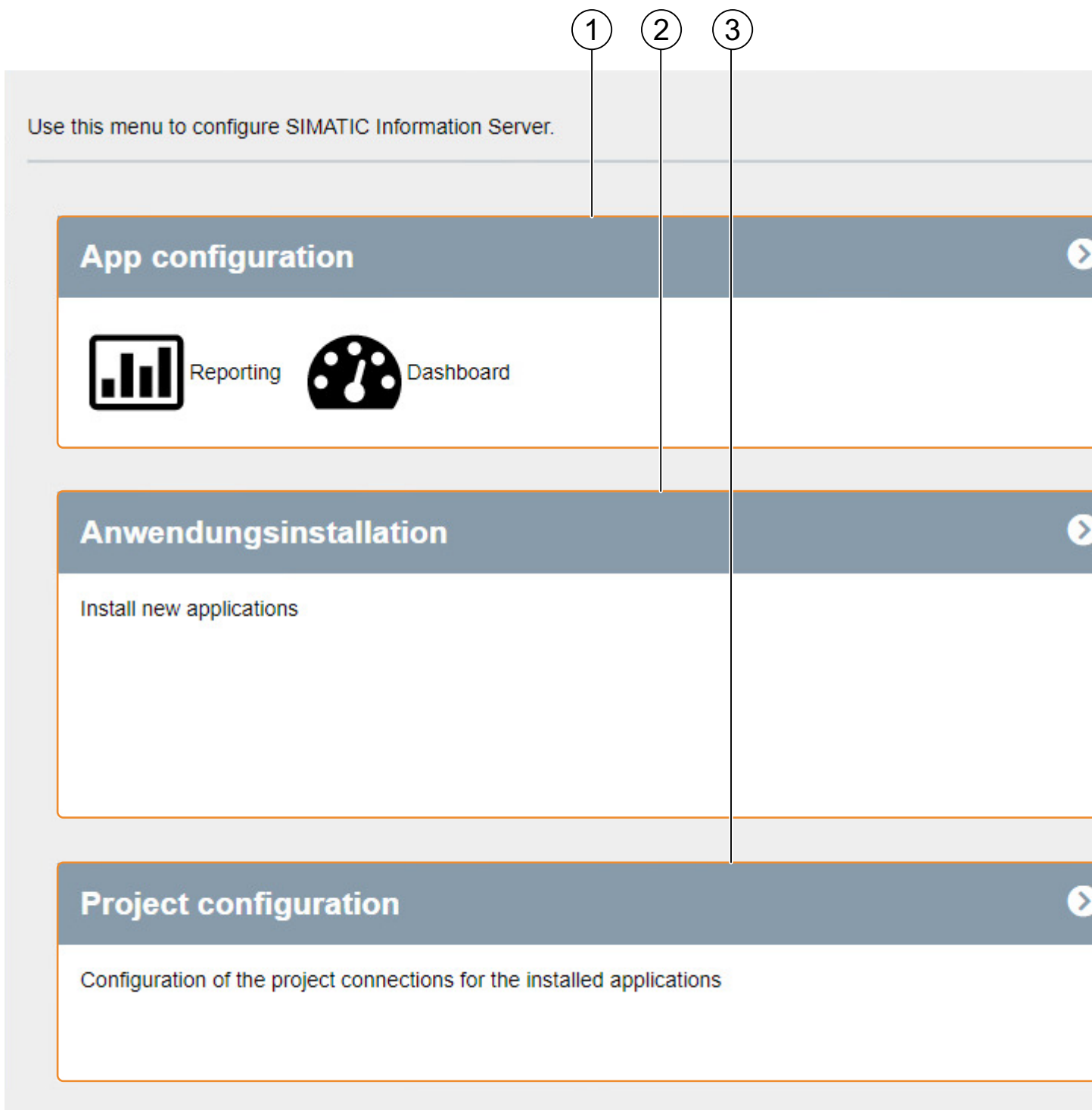
Administration

Definition

Settings can be made in the administration that are reserved exclusively for the administrative user group.

Layout

Administration is divided into the following areas:



- ① **App configuration** Configuration for reporting is subdivided into:
- Report templates (Page 129)
 - Report Clean Up (Page 130)
- The configuration for the dashboard contains the master pages.
- Dashboard (Page 135)

3.7 Web application

- ② Application Installer
(Page 147)
- ③ Project configuration
(Page 148)
- ④ E-mail settings
(Page 141)
- ⑤ Licensing (Page 147)
- ⑥ User configuration
(Page 154)

Integrating the Information Server in a Domain

Requirement

- You have administrative rights in the domain.
- You are entered as an administrator in the local Windows user group.

Procedure

1. Join the new domain.
2. Create a new domain user.
3. Add the new domain user to the desired SIMATIC Windows groups, at least the "SIMATIC Report Administrators" and "SIMATIC Report Services" groups.
4. Start the SIMATIC Web Configurator via "ConfigurationManager.exe".
5. Specify the login data of the new user.

Note

The new user must be a member of the domain.

6. Restart the system.
7. With the new user, open the Information Server Web page.

Result

In combination with the Windows user group, the first login creates the new profile in the database.

App configuration

Reporting administration app

Reporting (Administration)

Definition

Different templates are available to create a report. You can create, edit and display reports using the Web application.

You define the content of the report with the parameter assignment. The report is visualized according to the selected report template, for example, as diagram or table.

Toolbar in Reporting (Administration)

Definition

The toolbar contains all functions for configuration of report templates.

Structure

The following functions are available:



- | | | |
|---|--|--|
| ① | Create folder (Page 130) | Creates a new folder. |
| ② | Rename folder (Page 130) | Opens the edit mode for the name of the selected folder. |
| ③ | Delete folder (Page 131) | Deletes the selected folder. |
| ④ | Show/hide folder (Page 131) | Shows/hides the selected folder. |
| ⑤ | Import report template (Page 132) | Imports a report template. |
| ⑥ | Export report template (Page 132) | Exports the selected report template. |
| ⑦ | Move report template (Page 133) | Moves the selected report template. |
| ⑧ | Delete report template (Page 133) | Deletes the selected report template. |
| ⑨ | Show/hide a report template (Page 134) | Shows/hides the selected report template. |

See also

Configuring storage space (Page 134)

Report Clean Up

Definition

Report Cleanup allows you to configure limits for storing reports. When these limits are reached, database or disk space is automatically freed by stopping reporting, or exporting or deleting reports.

Application recommendations

Configuring storage space (Page 134)

Step-by-step instructions

Create folder

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select "Create".
2. Enter a name for the new folder.
3. Select "Save".

Result

A folder has been created.

Renaming folders

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select the folder you want to rename.
2. Select "Rename".
3. Enter the new name.
4. Select "Save".

Result

The folder is renamed.

Delete folder**Requirement**

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select the folder you want to delete.
2. Select "Delete".
3. Confirm the security prompt with "Yes".

Result

The folder is deleted.

Showing/hiding a folder**Requirement**

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select the folder you want to show/hide.
2. Select "Show/hide".

Result

The folder is shown / hidden.

Import report template

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Note

Importing report templates

Ensure that report templates that you create yourself or that you obtain externally do not contain any free text parameters, as this can lead to security risks with regard to SQL injections.

Procedure

1. Select "Import".
2. Select a file from the local repository in the "Select file" folder.

Note

File formats

The report templates can be files in the following formats:

- .rdl for reports for SQL Server Reporting Services (.rdl = Report Definition)
- .ert for Excel reports (.ert = Excel report template)

Importing report templates with the same name

When you import a report template that already exists with the same name in the Web application, the report template in the Web application is overwritten by the imported report template without prompting.

3. Confirm your selection with "Open".

Result

The report template is imported.

Export report template

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select a template that you want to export.
2. Select "Export".

Result

The report template is exported to the local repository folder.

Move report template**Requirement**

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select the template you want to move.
2. Select "Move".
3. Select the new location in the "Move template" dialog.
4. Confirm with "OK".

Result

The report template is moved to the new location.

Delete report template**Requirement**

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select the template you want to delete.
2. Select "Delete".
3. Confirm the security prompt with "Yes".

Result

The report template is deleted.

Showing/hiding a report template

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Configuration > Reporting > Templates" is open.

Procedure

1. Select the template you want to show/hide.
2. Select "Show/hide".

Result

The report template is shown/hidden.

Configuring storage space

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > Configuration > Reporting > Report Cleanup" is open.

Procedure

1. Activate the "Report Clean Up".
2. Specify whether the Report Cleanup is triggered by a time trigger, reaching a size limit, or both simultaneously.

Trigger	Setting
Time	<ul style="list-style-type: none"> • Once: One-time triggering of the Report Cleanups • Recurring: Configure the following for the Report Clean Up: <ul style="list-style-type: none"> – the start – optionally the end – the frequency
Size limit of the database	<ul style="list-style-type: none"> • Enter the maximum size in MB

3. Select the action that is performed when initiating the trigger.

Action	Setting
Stop report generation	-
Delete reports/ Export reports	<ul style="list-style-type: none"> Selected for cleanup: You can select reports and subscriptions as prioritized in Report Cleanup when they are created. This enables you to clean up reports by weighting. All: All reports are treated the same in a Report Clean Up.

4. Specify a path to a folder to which the reports can be exported for the "Export reports" action.

Note

The folder may not be on the drive where the database is located.

5. Specify the number of days after which the reports are deleted or exported for the "Delete reports" and "Export reports" actions.

Note

Enter "0" to continually run the Report Cleanup.

6. Select "Save".

Result

The storage space settings have been configured.

Administration app dashboard

Master pages

Definition

The selected master page configures the layout of all dashboards.

It is possible to create and configure any number of master pages for the dashboard layout.

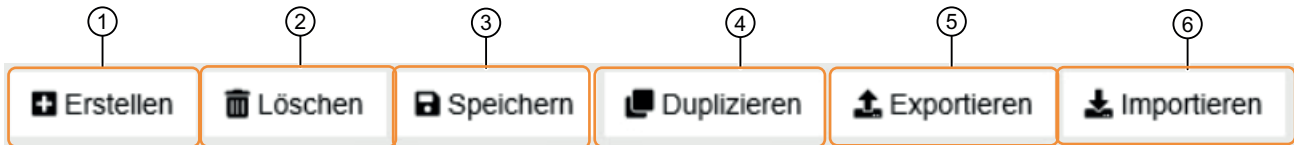
Toolbar for master pages

Definition

The toolbar contains all functions for configuring the master pages for the dashboards.

Layout

Administration > "Configuration" > "Dashboard" contains the following functions:



- | | | |
|---|---------------------------------------|---|
| ① | Create a master page
(Page 136) | Creates a master page. |
| ② | Deleting a master page
(Page 139) | Deletes the selected master page. |
| ③ | Saving a master page
(Page 139) | Saves the master page. |
| ④ | Duplicate a master page
(Page 139) | Duplicates the selected master page. |
| ⑤ | Exporting a master page
(Page 140) | Exports the selected master page. |
| ⑥ | Importing a master page
(Page 140) | Opens the dialog to import an existing master page. |

Step-by-step instructions

Create master page

Requirement

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration" > "Configuration" > "Dashboard" is open.

Procedure

1. Select "Create".
2. Make the following settings in the work area to configure the new master page:

Setting	Description
Name	Assign a title for the master page.
Background color	Select the background color.
Font color	Select the font color.

Setting	Description
Header	<p>By default, the header contains a placeholder for a title and a description.</p> <p>You can add a graphic to the default header using "Use image".</p> <p>If you want to create a custom layout for the header, enable the "Use user-defined header" button.</p> <p>Make the following settings:</p> <ul style="list-style-type: none"> To upload an image to the header, activate "Use image". If you click in the intended field for the image, a dialog for uploading an image opens. Enter text for the header and format the text using the tools in the input window. <p>Tool in input window:</p> <ul style="list-style-type: none"> Bold, italic or underlined Align right, centered, align left List or enumeration Indentation Insert hyperlinks, images or tables Placeholder for dashboard title, description, and current date <p>If you do not need a header line, enable "No header".</p>
Footer	<p>The footer is hidden by default.</p> <p>Select the "Use user-defined footer" button if you want to use a user-defined layout for the master page footer.</p> <p>Make the following settings:</p> <ul style="list-style-type: none"> To upload an image to the header, activate "Use image". If you click in the intended field for the image, a dialog for uploading an image opens. Enter text for the footer and format the text using the tools in the input window. <p>Tool in input window:</p> <ul style="list-style-type: none"> Bold, italic or underlined Align right, centered, align left List or enumeration Indentation Insert hyperlinks, images or tables Placeholder for dashboard title, description, and current date <p>If you do not need a footer, enable "No footer".</p>

3. Select "Save".

Result

The master page is created.

Deleting a master page

Requirement

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration" > "Configuration" > "Dashboard" is open.
- A master page is created.

Procedure

Select the master page that you want to delete.

Result

The selected master page is deleted.

Saving a master page

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration" > "Configuration" > "Dashboard" is open.
- A master page has been edited.

Procedure

Select "Save" to save the changes to the master page.

Result

The changes to the master page are saved.

Duplicate a master page

Requirement

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration" > "Configuration" > "Dashboard" is open.
- A master page is created.

Procedure

1. Select the master page that you want to duplicate.
2. Select "Duplicate".

Result

The selected master page is duplicated.

Exporting a master page

Requirement

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration" > "Configuration" > "Dashboard" is open.
- A master page is created.

Procedure

1. Select the master page you want to export.
2. Select "Export".

Result

The master page is exported to the local repository.

Importing a master page

Requirement

- You are a member of the SIMATIC Report Administrators Windows user group.
- "Administration" > "Configuration" > "Dashboard" is open.
- A master page is stored locally.

Procedure

1. Select "Import".
2. Select the file to be imported with "Select file".
3. Confirm your selection with "Import".

Result

The master page is imported and is displayed in the overview.

E-mail settings

E-mail settings

Definition

Configure the SMTP server settings for sending Information Server reports by e-mail.

Application recommendations

Configuring e-mail settings (Page 141)

Testing e-mail settings (Page 142)

Resetting e-mail settings to factory defaults (Page 142)

Step-by-step instructions

Configuring e-mail settings

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > E-mail settings" is open.

Procedure

1. Activate e-mail transmission.
2. Select an e-mail provider from the list.
3. Enter the information required for your selection.
 - Generic (Page 143)
 - Gmail (Page 145)
 - Office 365 (Page 143)
4. Select "Save".

Result

The e-mail settings are created.

Note

You can test your entries by pressing the "Test settings" button. A test e-mail is sent to the stored e-mail address. Use "Reset" to restore the original state and enter the settings again.

Testing e-mail settings (Page 142)

Resetting e-mail settings to factory defaults (Page 142)

Testing e-mail settings

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > E-mail settings" is open.
- The e-mail settings are created.

Procedure

Select the "Test settings" button.

Result

A test e-mail is sent to the stored e-mail address.

Resetting e-mail settings to factory defaults

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > E-mail settings" is open.
- The e-mail settings have been configured.

Procedure

Select "Reset".

Result

The original state of the e-mail settings is restored and you can re-enter the settings.

Configuring generic e-mail settings

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > E-mail settings" is open.
- E-mail delivery is enabled and "Generic" is selected as the e-mail provider.

Procedure

1. Enter the server IP address or host name of the server from which e-mails are sent.
2. Select:
 - a port
 - Your user name and password
 - an e-mail address that is displayed as the sender's e-mail address to the recipients of the e-mails.
3. Select "Save".

Result

The e-mail settings for a generic mail account are created.

You can test the settings by sending a test e-mail.

Configuring email settings for an Office 365 account

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > E-mail settings" is open.
- E-mail delivery is enabled and "Office 365" is selected as the e-mail provider.
- You are registered for the "Microsoft 365 Developer Program".
Developer Program (<https://developer.microsoft.com/en-us/microsoft-365/dev-program>)

Create application

1. Open the following link to the start page of Azure.
Azure home page (<https://portal.azure.com>)
2. Select "Azure Active Directory" in the menu.
3. In the "App registrations" menu, select the "Register an application" option.

3.7 Web application

4. Complete the fields for registration.
 - Assign a name for the application.
 - Select "Accounts in any organizational directory (any Azure AD directory-multitenant) and personal Microsoft accounts (e.g. Skype, ...)".
 - Under "Redirect URI" in the drop-down menu, select the option "Web" as the application type.
 - Copy the required address from the last line of the "Email Settings" dialog in the App administration in the Web application of the Information Server.
5. Confirm with "Register" for data generation.

Note

In the overview, you can find the Client ID and Tenant ID that you will need in the following steps to complete the e-mail settings in the Information Server Web application.

Generate client secret

1. Open the application you created via "Azure Active Directory" > "Manage" > "App registration" > "Owned applications".
You are in the overview of the application.
2. In the "Certificates & secrets" menu item, select "New client secret".
The "Add a client secret" page opens.
3. Enter a description and select an "Expires" option.
4. Confirm with "Add".
The created generated document appears in the overview.
5. Copy the value of the generated document to the e-mail settings of the Information Server.

Add API permissions

1. Open "Azure Active Directory" > "Manage" > "API permissions".
2. Select "Add a permission".
3. Select "Microsoft Graph".
4. Select "Delegate permissions".
5. Add the following permissions:
 - Mail.Send: Send mail as a user
 - openid: Sign users in
 - User.Read: Sign in and read user profile

Configure e-mail settings in the IS

1. Open "Administration" > "E-mail settings".
2. Enable the settings.

3. Insert the required information that you created in the previous steps with Azure.
4. Select "Get authorization token" .
5. Enter the required Microsoft credentials.
6. Accept the required authorizations.
7. Select "Save".

Result

The e-mail settings for an Office 365 account are created.

You can test the settings by sending a test e-mail.

Configuring email settings for a Gmail account

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > E-mail settings" is open.
- E-mail delivery is enabled and "Gmail" is selected as the e-mail provider.
- The Google APIs & Services (<https://console.developers.google.com//XmlEditor.InternalXmlClipboard:4384213f-03bd-06e4-c704-bf7e9539203d>)page is open and you are logged in with an existing Gmail account.

Procedure

1. Select "Dashboard" in the sidebar.
2. Select "Create project".
If a project has already been created, select the existing project. Proceed to step 4.
3. Enter the required data and select "Create".
4. Select the created project from the menu bar.
5. Select "Enable APIs and services".
6. Select "Gmail API" from the list.
7. Confirm the selection of the Gmail API with "Enable".

Configure the "OAuth consent screen"

1. Select "OAuth consent screen" in the sidebar.
2. Select as "User Type" > "External" and confirm with "Create".
3. In the following, enter the "App name" and the "User support e-mail".

3.7 Web application

4. Enter the e-mail address under "Developer contact information".
5. Confirm with "Save and continue".
The created application can be seen in the overview of the "OAuth consent screen" page.

Create "Credentials"

1. Select "Credentials" in the sidebar.
2. Select "Create credentials" from the menu bar and select "OAuth client ID".
3. Fill in the following fields:
 - Application type: Web application
 - Name
 - Authorized redirect URI: Copy from the "E-mail settings" dialog > "Redirect URI".
4. Confirm with "Create".
The client data "ClientID" and "ClientSecret" have been created under Credentials.

Configure e-mail settings in the IS

1. Open "Administration" > "E-mail settings".
2. Enable the settings.
3. Insert the required information that you created in the previous steps with Azure.
4. Select "Get authorization token" .
5. Enter the required Microsoft credentials.
6. Accept the required authorizations via "Advanced" > "Go to siemens.net (unsafe)" > "Allow".
7. Confirm the authorizations with "Allow".
8. Select "Save".

Result

The e-mail settings for a Gmail account are created.

You can test the settings by sending a test e-mail.

Note

You can test your entries by pressing the "Test settings" button. A test e-mail is sent to the stored e-mail address. Use "Reset" to restore the original state and enter the settings again.

Application Installer

Application Installer

Definition

The Application Installer is a wizard for updating the apps in the Web application. You are automatically forwarded to the start page of the Application Installer if you open the Web application and an app is not up-to-date.

If all apps are up to date, the list serves as an overview of the current versions of the apps.

Step-by-step instructions

Using the Application Installer

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > Application Installer" is open.

Procedure

Select the "Install or update application".

Result

The application in the Application Installer have been installed and/or updated.

Licensing

Licenses

Definition

The SIMATIC Information Server provides the following license types:

Product	License type	Number of licenses	MLFB	WiBu product code
Information Server	Single	Without restriction	6DL8906-0AC00-0AB5	60001
Information Server client access	Single	1	6DL8906-0BC00-0AB5	60002

Step-by-step instructions

Check licenses

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators".
- "Administration > Licensing" is open.

Procedure

In the table, check, based on the status, whether a valid information server license is used.

Result

The present licenses have been checked.

Project configuration

Project configuration

Definition

The folders in the project configuration contain the projects that serve as data source for the reports.

To gain access to the project data, connect the Information Server to a data source.

Organize your data sources, for example, by creating new folders for projects in the project configuration or configuring existing folders. When you select a data source in the folder structure, you can see the metadata of the data source in the work area, for example, creation date, version or project type.

Note

Project archiving

After selecting an available project, you can see its project type, for example: PCS neo.

Assign an alias for projects with the same name to be able to assign the data sources quickly during report creation.

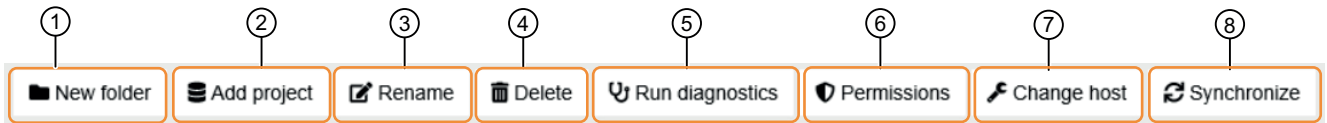
Toolbar in project configuration

Definition

The toolbar contains all functions for project configuration.

Structure

The following functions are available:



- | | | |
|---|------------------------------------|---|
| ① | Create new folder (Page 150) | Creates a new folder. |
| ② | Add project (Page 150) | Adds a new project. |
| ③ | Rename project (Page 151) | Renames the selected project. |
| ④ | Delete project (Page 151) | Deletes the selected project. |
| ⑤ | Start a diagnostics run (Page 152) | Starts a diagnostics run. |
| ⑥ | Assign authorizations (Page 152) | Opens the dialog for configuration of authorizations. |
| ⑦ | Change host (Page 153) | Opens the dialog box for changing the host. |
| ⑧ | Start simulation (Page 149) | Synchronizes the entries. |

Step-by-step instructions

Start simulation

By synchronizing, you trigger a manual transfer of the data sources stored in the Information Server database to the DataHost service. The DataHost service has an independent data archive for this data.

Synchronization is necessary, for example, if the configuration data in the Webframe database have been modified manually or the DataHost configuration file has been corrupted.

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators" or "SIMATIC Report Publishers". This enables you to connect a data source, e.g. Process Historian database.
- Users of the "SIMATIC Report Services" group must be created both on the Information Server and on the PC on which the data source is located.
The user must have SIMATIC HMI rights on the PC with the data source.
- The Process Historian has been activated.
- "Administration > Project configuration" is open.

Procedure

1. Select "Synchronize".

Result

Synchronization is complete.

Create new folder

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators" or "SIMATIC Report Publishers". This enables you to connect a data source, e.g. Process Historian database.
- Users of the "SIMATIC Report Services" group must be created both on the Information Server and on the PC on which the data source is located.
The user must have SIMATIC HMI rights on the PC with the data source.
- The Process Historian has been activated.
- "Administration > Project configuration" is open.

Procedure

1. Select "Create new folder".
2. Assign a name.
3. Select "Save".

Result

A new folder for the projects is created and visible in the hierarchy.

Add project

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators" or "SIMATIC Report Publishers". This enables you to connect a data source, e.g. Process Historian database.
- Users of the "SIMATIC Report Services" group must be created both on the Information Server and on the PC on which the data source is located.
The user must have SIMATIC HMI rights on the PC with the data source.
- The Process Historian has been activated.
- "Administration > Project configuration" is open.

Procedure

1. Select "Add project".
2. Assign a data source to the project. You can use the following data source:
 - Process Historian database
3. Click on "Continue".
4. Enter a host name or IP address in the field.

5. Select "Select project".
6. Select the projects you want to add and enter their names.
7. Select "Add".

Result

A project is added.

Rename project

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators" or "SIMATIC Report Publishers". This enables you to connect a data source, e.g. Process Historian database.
- Users of the "SIMATIC Report Services" group must be created both on the Information Server and on the PC on which the data source is located.
The user must have SIMATIC HMI rights on the PC with the data source.
- The Process Historian has been activated.
- "Administration > Project configuration" is open.

Procedure

1. Select the project you want to rename.
2. Select "Rename project".
3. Assign a new name.
4. Save your input.

Result

The project is renamed.

Delete project

Requirement

- You are a member of the Windows user group "SIMATIC Report Administrators" or "SIMATIC Report Publishers". This enables you to connect a data source, e.g. Process Historian database.
- Users of the "SIMATIC Report Services" group must be created both on the Information Server and on the PC on which the data source is located.
The user must have SIMATIC HMI rights on the PC with the data source.

3.7 Web application

- The Process Historian has been activated.
- "Administration > Project configuration" is open.

Procedure

1. Select the project you want to delete.
2. Select "Delete project".
3. Confirm your selection.

Result

The selected project is deleted.

Starting a diagnostic run

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Project configuration" is open.

Procedure

1. Select a project.
2. Select "Start a diagnostics run".

Note

You can save the log files of the diagnostic run locally using "Download log files".

Result

A table with the results of the diagnostic run opens. The table provides an overview of the features and their status.

The diagnostic run is completed.

Assigning authorizations

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Project configuration" is open.

Procedure

1. Select a project.
2. Select "Authorizations".
3. Select the user to whom you want to assign authorizations for this project in the form of roles. By clicking in the text field, a drop-down menu opens in which all users are stored.
4. Select the roles you want to assign to the selected user from the list. By clicking in the text field, a drop-down menu opens with all the roles you can assign.

Note

If you want to revoke authorizations from the user, remove the corresponding check marks from the role.

5. Select "Save".

Result

The authorizations for the user are assigned.

Changing the host

If you move a project like PH or WinCC to another computer, you have to adjust the host accordingly.

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration > Project configuration" is open.

Procedure

1. Select the project for changing the host.
2. Select "Change host"
3. Enter a host name in the field "hostname".
4. Enter an instance name in the field "instance name".
5. Select "OK".

Result

The host has been adjusted.

You can view the changed metadata in the overview of the selected project.

User configuration

User configuration

Definition

Under "Users", you can see an overview of all users of the Information Server including the metadata, such as, for example:

- Stored e-mail addresses
- Language settings
- Associated Windows user groups

In this area you can:

- Create new users
- Edit new users
- Configure group authorizations for the Windows user groups.

Note

To manage users and assign them to Windows user groups, use Windows Computer Management.

The Information Server uses the following local Windows user groups:

Windows user group	Rights
SIMATIC Report Services	This group should only be assigned to the user under which the Information Server services run: <ul style="list-style-type: none"> • Information Server Scheduler • Datahost • IIS Worker Process.
SIMATIC Report Administrators	Unrestricted access to all functions of the Information Server
SIMATIC Report Users	Create and configure reports and dashboards
SIMATIC Report Publishers	Create and load reports and dashboards
SIMATIC Report Viewers	Read access to reports and dashboards

Note

If you are a member of the "SIMATIC Report Services" Windows user group, assign yourself to another user group to use the Information Server.

Mapping of UMC and Windows groups in PCS neo

User groups of the Information Server in PCS neo

The following description applies to the scenario of the initial login to the Information Server via PCS neo.

During this step, the UMC groups to which the UMC user belongs are once mapped to the corresponding groups in the IS. A "SIMATIC PCS neo Runtime Management Engineer" thus becomes a "SIMATIC Reporting User". If there are multiple UMC groups that apply, the IS groups are assigned additively. This process makes it possible for the user to be assigned to any number of groups, whereby the highest-level permissions apply.

Note

The "SIMATIC Report ..." groups do not exist initially. These groups must be created by the administrator.

All information and related links on the topic of user management are available in the following section:

Project administration > User management > Manage users - Overview

Mapping of groups

When the user is a member of one of the following UMC groups, the user is applied to the corresponding IS groups.

UMC group	Corresponding IS group	Description
SIMATIC PCS neo System Administrators	SIMATIC Report Administrators	Predefined UMC group
SIMATIC PCS neo Device Integration Engineers	SIMATIC Report Users	Predefined UMC group
SIMATIC PCS neo Project Management Engineers	SIMATIC Report Administrators	Predefined UMC group
SIMATIC PCS neo Runtime Management Engineers	SIMATIC Report Users	Predefined UMC group
SIMATIC Report Administrators	SIMATIC Report Administrators	The group must be created by the UMC administrator.
SIMATIC Report Publishers	SIMATIC Report Publishers	The group must be created by the UMC administrator.
SIMATIC Report Users	SIMATIC Report Users	The group must be created by the UMC administrator.
SIMATIC Report Viewers	SIMATIC Report Viewers	The group must be created by the UMC administrator.

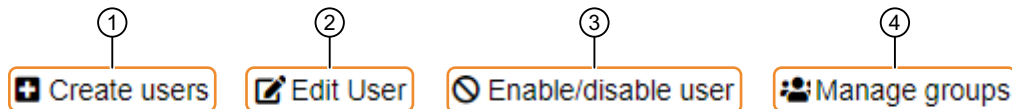
Toolbar in user configuration

Definition

The toolbar contains all functions for user configuration.

Structure

The following functions are available:



- | | | |
|---|---------------------------|--|
| ① | Create user
(Page 156) | Creates a user. |
| ② | Edit user (Page 157) | Opens the edit mode of the selected user. |
| ③ | Delete user
(Page 157) | Deletes the selected user. |
| ④ | Manage groups | Opens the dialog for group management: <ul style="list-style-type: none"> • Create user groups (Page 158) • Edit user groups (Page 158) • Delete user groups (Page 159) |

Step-by-step instructions

Create user

Requirement

- You are member of a Windows user group or registered as local user in the domain.
- "Administration" > "User configuration" is open.

Procedure

1. Select "Create user".
2. Select the user you want to create.
3. Select "Save".

Note

Alternatively, you can create a user by adding the user to a SIMATIC Report group on your computer. When users log on for the first time, they are created as Information Server users. Users can then be assigned to other groups in the Web application.

Result

The user is created and appears in the overview.

Edit user**Requirement**

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration" > "User configuration" is open.

Procedure

1. Select the user whose settings you want to edit.
2. Make the required settings for the user:

Tab	Settings
General	<ul style="list-style-type: none"> • Display name • E-mail address • Language • Locked • Delete all status data of the application
Notifications	Select notifications
Groups/Permissions	<ul style="list-style-type: none"> • Groups • Additional permissions
Effective permissions	Overview of permissions

3. Select "Save".

Note

Alternatively, you can create a user by adding the user to a SIMATIC Report group on your computer. When users log on for the first time, they are created as Information Server users. Users can then be assigned to other groups in the Web application.

Result

The user is edited.

Activate / deactivate user**Requirement**

- You are member of a Windows user group or registered as local user in the domain.
- "Administration" > "User configuration" is open.

Procedure

1. Select the user you want to activate / deactivate.
2. Select "Activate / deactivate user".
3. Confirm the selection with "Continue".

Result

The user is activated / deactivated.

Creating a user group

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration" > "User configuration" is open.

Procedure

1. Select "Manage groups".
2. Select "Add".
3. Enter a name and a description for the group.
4. Activate the permissions for the group.
5. Select "Save".

Result

The user group has been created and appears in the overview.

Editing a user group

Requirement

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration" > "User configuration" is open.

Procedure

1. Select "Manage groups".
2. Select a group.
3. Select "Edit".
4. Edit the name and description of the group.

5. Activate or deactivate permissions for the selected group.
6. Select "Save".

Result

The user group is edited.

Deleting user groups**Requirement**

- You are a member of the Windows user group SIMATIC Report Administrators.
- "Administration" > "User configuration" is open.

Procedure

1. Select "Manage groups".
2. Select a group.
3. Select "Delete".
4. Select "Save".

Result

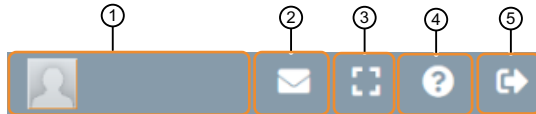
The user group is deleted.

3.7.6 Header

3.7.6.1 Header

Definition

The header consists of the following areas:



- | | | |
|---|--------------------------------|--|
| ① | User profile
(Page 160) | Opens the user profile. |
| ② | Notifications
(Page 161) | Displays the notifications to which you have subscribed. |
| ③ | Full-screen mode
(Page 168) | Enables or disables full-screen mode. |
| ④ | Help (Page 163) | Opens the Information Server help. |
| ⑤ | Logout (Page 167) | Logs the user out. |


3.7.6.2 User profile

Definition

The user profile contains the following information and specifications:

- General:
 - Specification of the display names
 - Selection of a profile picture
 - E-mail address
 - Selection of the display language
 - Delete status data of the application
- Selection of the notification types that are received or sent
- Effective authorizations: Overview of the current authorizations of the assigned Windows user group

User profile ✕



General

Notifications

Groups/Permissions

Effective permissions

Display name

Email address

Language English (United States) ▼

Clear all application state data

Cancel

Save

- | | | |
|---|----------------------------------|--|
| ① | Profile picture (Page 163) | Uploads a new profile picture. |
| ② | General (Page 164) | Displays general information about the user profile, e.g. the language selection |
| ③ | Notifications (Page 165) | Shows the list of notifications that can be activated. |
| ④ | Groups/Permissions (Page 166) | Shows the overview of the groups assigned to your profile. |
| ⑤ | Effective permissions (Page 167) | Shows the list of all permissions assigned to your profile and role. |

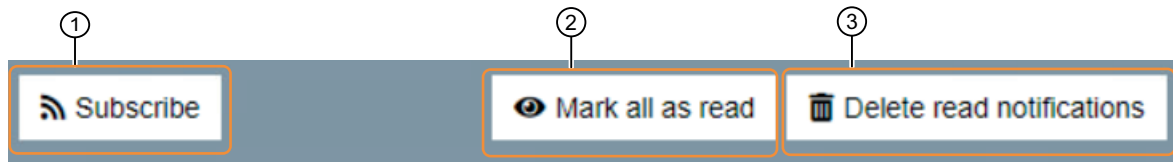
3.7.6.3 Notifications

Definition

In the Notifications area you receive the news that you have selected in your profile under "Notifications".

Structure

The following functions are available:



- | | | |
|---|--|----------------------------------|
| ① | Subscribe (Page 165) | Creates a new subscription. |
| ② | Mark all as read (Page 165) | Marks all notifications as read. |
| ③ | Delete all read notifications (Page 166) | Deletes all read notifications. |

3.7.6.4 Step-by-step instructions

Clear all application state data

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The user profile is open.

Procedure

1. Select the "General" tab.
2. Select the "Clear all application state data" button.

Note

You delete the following data by confirming this option:

- Configuration of tables in reporting (sorting, filters, displayed columns).
 - Selection of tags/messages/batch: Position, size, last selected folder
-

Result

The application state data is deleted.

Upload profile picture

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Open the user profile.
2. Select the placeholder of the profile picture.
3. Select the required profile picture.
4. Confirm your selection.

Result

The profile picture is uploaded.

Opening online help

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open and the PUD is installed.

Procedure

Select the "?" button.

Result

The PUD online help opens.

Opening a user profile

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

Select "User profile".

Result

The "User profile" dialog opens.

Change language

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Open "User profile".
2. Select the "General" tab.
3. Select the language from the drop-down menu.
4. Select "Save".

Result

The display language is changed.

Subscribing to notifications

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Select "User profile".
2. Select the "Permissions" tab.
3. In the list, select the notification types that you want to receive and send.
4. Select "Save".

Result

The notifications are activated.

Mark all notifications as read

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Open "Notifications".
2. Select "Mark all notifications as read".

Result

All notifications are marked as read.

Delete all read notifications

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Open "Notifications".
2. Select "Delete read notifications".

Result

All read notifications are deleted.

Checking groups/permissions

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Open "User profile".
2. Select the "Groups/Permissions" tab.
3. Check the overview of the groups assigned to your profile.
4. Select "Save".

Result

The user is logged off.

Checking effective permissions

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Open "User profile".
2. Select the "Check permissions in effect" tab.
3. Check the list of all rights assigned to your profile and role.
4. Select "Save".

Result

The user is logged off.

Log out user

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Select "Logout".

Note

Logout is only available when the Information Server is not opened via the PCS neo Portal.

Result

The user is logged out.

Enable full-screen mode

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Web application is open.

Procedure

1. Select "Full-screen mode".

Result

Full-screen mode is enabled.

3.8 Office add-in

3.8.1 Office add-in

Download of the Microsoft Office add-in to the computer is a prerequisite for adding the reports in Microsoft Excel, and for creating and editing reports in Excel.

There are two options:

- You have already installed the Microsoft Office add-in when you installed the SIMATIC Information Server.
- You install the add-in directly from the Web application via the "Download" app.

Note the requirements for the installation.

3.8.2 Report types in the Office add-in

Definition

There are two types of reports in the Office add-in:

- Report templates
You can create a report on the Information Server and insert it as a graphic in an Excel file. Report generation corresponds to the procedure in the Web application of the Information Server.
- Excel report templates
You can create report templates for Excel. Process values or messages are inserted into the cells of an Excel worksheet. When relative times are used, you can update the cell contents. You use the Excel functions to process the data. For example, you can use the Excel graphics function to visualize process value trends.

3.8.3 Subscriptions for report templates in Excel

Definition

You can subscribe to reports from report templates created with Excel and stored on the Information Server. The formulas and diagrams contained in the reports are automatically updated.

The difference between the templates you create in Excel and the templates from the Web application is that the Excel templates in the Information Server are generated either by MS Excel or via Open XML, while the Web application templates are generated via the MS Report Server.

Note

To support the automatic update of formulas and charts, MS Excel must be installed on the server. The Information Server attempts to generate Excel reports via MS Excel. If Excel is not available on the server, the reports are generated via Open XML and some formulas and diagrams may not be automatically updated.

3.8.4 Microsoft Office versions for the Office add-in

Definition

To use the Microsoft Office add-in, one of the following versions must be installed on your computer.

Product	Note
Microsoft Office 2019	64-bit
Microsoft Office 365	64-bit

3.8.5 Requirements for installing the Office add-in

- You are a member of the Windows user group SIMATIC Report Administrators.
- One of the following Microsoft Office versions (including Service Packs of the version) is installed on your computer.

Product	Note
Microsoft Office 2019	64-bit
Microsoft Office 365	64-bit

- The Microsoft Visual Studio Tools for Office Runtime (MS VSTO RT) are installed on your computer. If you have not yet installed MS VSTO RT, follow the link to the download. Install the same language you selected for the Information Server.
- Microsoft.NET Framework 4.8 is installed on your computer. If you have not yet installed Microsoft.NET Framework 4.8, follow the link to download. Install the same language which you intended for the Information Server.
- Exit all Windows program before running the setup for the Office add-ins.

Note

The concurrent use of different Office versions on one computer is not supported.

See also

Microsoft Visual Studio Tools for Office Runtime (<https://www.microsoft.com/en-US/download/details.aspx?id=48217>)

Microsoft .NET Framework 4.5.1 (<https://www.microsoft.com/en-US/download/details.aspx?id=40779>)

3.8.6 Step-by-step instructions

3.8.6.1 Installing Office add-in

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators

Procedure with deposited certificate

1. Check if all requirements for installing the add-in are met.
Requirements for installing the Office add-in (Page 170)
2. Download the Office add-in from the Web application.
Downloading the Office add-in from the Web application (Page 171)
3. Connect the Office add-ins to the Information Server
Connecting Office add-in without a stored certificate to the Information Server (Page 171)
Connecting Office add-in with a stored certificate to the Information Server (Page 173)

Result

The Office add-in has been installed.
Opening an Office add-in (Page 174)

3.8.6.2 Download Office add-in from the Web application

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The requirements for installing the Office add-in are met.

Procedure

1. Open the "Download" application.
2. Select "Download".
3. Follow the installation instructions in the setup.

Result

The Office add-in has been installed.

3.8.6.3 Connecting Office add-in to the Information Server without a stored certificate

Requirement

- One of the approved Microsoft Office versions is installed on your computer.
- The Information Server is installed.

3.8 Office add-in

- The Office add-in has been downloaded.
- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators

Procedure

1. Open Microsoft Excel.
2. Navigate to the "Information Server" tab.
3. Click "Server" in the "Configuration" area.
The "Server Settings" dialog opens.
4. Enter the URL of the Information Server.
5. Select the port corresponding to that of the Information Server and confirm the dialog.
The "Untrusted Certificate" dialog opens.
6. Confirm the dialog to permanently add the certificate to the trusted root certificates.
7. Click "OK" to start the "Certificate Import Wizard" dialog.
The "Certificate Import Wizard" opens.
8. Select "Current user" and confirm with "Next".
9. Load the certificate name into the dialog via the browsing button and confirm with "Next".
10. If you have exported the certificate with a password, enter this password here and click "Next".
If you have exported the certificate without a password, do not enter a password and click "Next".
11. Select the option "Place all certificates in the following store".
12. Select the folder "Trusted roots certification authorities" via the browsing button and confirm with "OK".
13. Click "Next".
14. Check the settings and confirm with "Finish".

Result

The add-in is connected to the Information Server.

In the Excel Office add-in, the connection status is visible in the footer.

Note

No connection to the Information Server

If there is no connection to the Information Server, check if an appropriate license is available or if there are network problems. If necessary, repeat the connection procedure.

If there is no existing connection to the Information Server, the commands in the quick access toolbar are not enabled.

3.8.6.4 Connecting Office add-in with a stored certificate to the Information Server

Requirement

- One of the approved Microsoft Office versions is installed on your computer.
- The Information Server is installed.
- The Office add-in has been downloaded.
- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators

Procedure

1. Save the certificate in the folder "Trusted roots certification authorities".
2. Open Microsoft Excel.
3. Navigate to the "Information Server" tab.
4. Click "Server" in the "Configuration" area.
The "Server Settings" dialog opens.
5. Enter the URL of the Information Server.
6. Select the port corresponding to that of the Information Server.
7. Confirm the dialog.
A logon dialog for authentication dialog opens.
8. Enter your logon data and confirm the dialog with "OK".

Note

Repeat this process for each Office add-in that you use to create and edit reports.

The last five server connections are stored in order of their use. In the "Server Settings" dialog, you can check the server settings or select another server.

Result

The add-in is connected to the Information Server.

3.8 Office add-in

In the Excel Office add-in, the connection status is visible in the footer.

Note

No connection to the Information Server

If there is no connection to the Information Server, check if an appropriate license is available or if there are network problems. If necessary, repeat the connection procedure.

If there is no existing connection to the Information Server, the commands in the quick access toolbar are not enabled.

3.8.6.5 Open Office add-in

Requirements

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.

Procedure

1. Open an Office add-in.
2. Navigate to the "Information Server" tab.

Result

Open an Office add-in is open.

3.8.7 Excel Office add-in

3.8.7.1 Excel Office add-in

Definition

Within the Excel Office add-in, you can insert, create and edit reports.

Layout of the Web application

The Excel Office add-in consists of the following areas:

The screenshot shows the SIMATIC Information Server interface with the Excel Office add-in toolbar. The toolbar is divided into three main sections: 'Reports' (Callout 1), 'Excel Workbook' (Callout 2), and 'Configuration' (Callout 3). The 'Reports' section includes 'Create', 'Tags', and 'Messages'. The 'Excel Workbook' section includes 'Run', 'Open', and 'Save'. The 'Configuration' section includes 'Server' and 'Help'. The main window displays a data table with columns for Time and Value [kg].

Time	Value [kg]
Di, 28 Apr 2020 13:01:28,108	-4983,00
Di, 28 Apr 2020 13:01:28,608	-4983,00
Di, 28 Apr 2020 13:01:29,108	-4983,00
Di, 28 Apr 2020 13:01:29,608	-4983,00
Di, 28 Apr 2020 13:01:30,108	8532,00
Di, 28 Apr 2020 13:01:30,608	8532,00
Di, 28 Apr 2020 13:01:31,108	8532,00
Di, 28 Apr 2020 13:01:31,608	8532,00
Di, 28 Apr 2020 13:01:32,108	7344,00
Di, 28 Apr 2020 13:01:32,608	7344,00
Di, 28 Apr 2020 13:01:33,108	7344,00
Di, 28 Apr 2020 13:01:33,608	7344,00
Di, 28 Apr 2020 13:01:34,108	-6848,00
Di, 28 Apr 2020 13:01:34,608	-6848,00
Di, 28 Apr 2020 13:01:35,108	-6848,00
Di, 28 Apr 2020 13:01:35,608	-6848,00
Di, 28 Apr 2020 13:01:36,108	8362,00
Di, 28 Apr 2020 13:01:36,608	8362,00
Di, 28 Apr 2020 13:01:37,108	8362,00
Di, 28 Apr 2020 13:01:37,608	8362,00
Di, 28 Apr 2020 13:01:38,108	-7362,00

Connected to <https://phis2020:443/>

- ① **Toolbar (Page 177)** Provides access to the features of the Excel Office add-in.

- ② Footer (Page 203) Shows the connection status of the Office add-in.
- ③ Work area Shows the added reports, messages and tags.

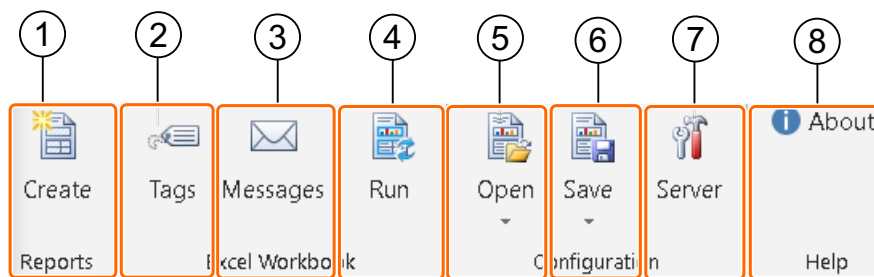
3.8.7.2 Toolbar in Excel

Definition

The toolbar gives you access to the functions of the Office add-in.

Layout

The toolbar consists of the following areas:



- ① Create (Page 178) Create a report in Excel
- ② Tags
 - Create tags
 - Configure tags
 - Delete tags
- ③ Messages
 - Create messages
 - Configure messages
 - Delete messages
- ④ Update (Page 192) Update the Excel workbook.
- ⑤ Open
 - Open locally saved Excel reports
 - Open Excel reports from the Information Server
- ⑥ Save
 - Save Excel report templates locally
 - Save Excel report templates to the Information Server
- ⑦ Server (Page 193) Open the server settings
- ⑧ About / Help Open the information about the Information Server add-in.

Step-by-step instructions

Creating a report in Excel

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.

Procedure

1. Select "Create" in the "Reports" section.
2. In the "Create report" dialog, navigate to "Report templates > Templates" in the folder tree.
3. Select the report template that you use to create the report.
4. Configure the report template or apply a saved parameter default under "Parameter defaults", if available.

Note

Creating, applying or deleting parameter defaults

Here, you can accept parameter presets that you have already created in the Web application, create new parameter presets with the "+" button or delete existing ones.

You can find information about creating parameter presets in Excel under: Parameter defaults in Excel (Page 200)

You can find information about creating parameter presets in the Web application under: Creating parameter preset (Page 107)

5. Select "Create report".

Note

Display of queries with multiple-page results

For queries with multiple-page results, only the first page is displayed.

Result

A report has been created.

Opening locally saved Excel reports

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.

Procedure

1. Select "Open local file" in the "Configuration" area.
2. Select a report in the local repository and confirm the dialog.

Note

File format

The following file format is required for the import: .ert

Create folder

You can create a new order in the hierarchy using the keyboard shortcut "Ctrl+N" or the shortcut menu.

Delete folder

You can delete a selected folder in the hierarchy using the "Del" key or the shortcut menu.

The folder must be empty to perform the operation successfully.

Result

A report template is open.

Open Excel reports from the Information Server

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. Select "Open" in the "Configuration" area.
2. In the Information Server repository, select the report to be imported and confirm the dialog.

Note

File format

The following file format is required for the import: .ert

Create folder

You can create a new order in the hierarchy using the keyboard shortcut "Ctrl+N" or the shortcut menu.

Delete folder

You can delete a selected folder in the hierarchy using the "Del" key or the shortcut menu.

The folder must be empty to perform the operation successfully.

Result

A report template is imported.

Saving Excel report templates locally

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- A report template is configured.

Procedure

1. Select "Save locally" in the "Configuration" area.
2. Select a local repository location for the report and confirm the dialog for saving.

Note

Create folder

You can create a new order in the hierarchy using the keyboard shortcut "Ctrl+N" or the shortcut menu.

Delete folder

You can delete a selected folder in the hierarchy using the "Del" key or the shortcut menu.

The folder must be empty to perform the operation successfully.

Result

A report template is saved.

Save Excel report templates to the Information Server

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- A report template is configured.

Procedure

1. Select "Save" in the "Configuration" area.
2. Select a location on the Information Server for the report and confirm the dialog.

Note

Create folder

You can create a new order in the hierarchy using the keyboard shortcut "Ctrl+N" or the shortcut menu.

Delete folder

You can delete a selected folder in the hierarchy using the "Del" key or the shortcut menu.

The folder must be empty to perform the operation successfully.

Result

A report template is exported.

Creating a subscription in Excel

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. Select "Save".
2. Select a folder to which to save the template in the "Save" dialog.
3. Name the template.
4. Enter a description for the template.
5. Select "Save".
6. Open the Web application of the Information Server.
7. In Reporting, navigate to the selected template location.
8. Open the Edit mode for the Excel report template.
9. Configure the Excel report template.

10. Select "Create subscription".

Note

These subscriptions only generate reports in Microsoft Excel format. The generated reports appear in the "Reports" overview of the created template in Reporting.

Details on configuration of subscriptions:

[Creating a subscription \(Page 121\)](#)

11. Save your entries.

Result

A subscription is created.

Create tags**Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. Select "Tags" in the "Excel Workbook" area.
2. In the "Add or edit tags" dialog, select a project.

Note

The last selected project is automatically selected the next time the dialog is opened.

3. Navigate to an archive and add one or more tags to the "Selected tags" overview by double-clicking or using drag-and-drop.
4. Confirm the input with "OK".

Result

The tag is created.

Configuring tag

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. Select "Tags" in the "Excel Workbook" area.
2. In the "Add or edit tags" dialog, select a project.

Note

The last selected project is automatically selected the next time the dialog is opened.

3. Select the tag you want to edit in the "Selected tags" overview.
4. You configure the following standard parameters independently of the mode selected in the line of the tag:
Editing standard parameters of the tag (Page 185)
5. In the "Mode" column, select one of the configuration modes and make the settings for the selected mode.
Setting the configuration mode for tags (Page 186)
6. Confirm the input with "OK".

Note**Enable maximum number**

If the maximum number of values is set, values are output from the beginning of the time interval up to the maximum number. If the maximum number is greater than the number of values present in the time interval, the "Max. number" setting is ignored.

Result

The tag is configured.

See also

Time information (Page 102)

Configuring the standard parameters of the tag

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.
- The tag you want to edit is selected in the "Selected tags" overview.

Procedure

Configure the following standard parameters directly in the line of the tag:

Parameter	Description
Start	Select a start date for the tag. You can enter absolute and relative times here. The released time information and examples can be found in the section "Time information" (Page 102).
End	Select an end date for the tag. You can enter absolute and relative times here. The released time information and examples can be found in the section "Time information" (Page 102).
Cell reference	Select the target cell for the tag in the Excel worksheet. You can click on the button in the "Cell reference" row. The dialog collapses so that you can directly select a cell and the value is applied. Alternatively, enter the value of a cell directly.
Sheet orientation	Select the orientation of the form. <ul style="list-style-type: none"> • Horizontal • Vertical
Labeling	Specify whether and which labels the cells have in the Excel worksheet. The labeling position depends on the sheet orientation (horizontal/vertical). <ul style="list-style-type: none"> • No label • Above (vertical): The names of the columns are above the values. • Below (vertical): The names of the columns are below the values. • Right (horizontal): The names of the columns are to the right of the values. • Left (horizontal): The names of the columns are to the left of the values.
Time stamp	Specify whether the values have a time stamp. <ul style="list-style-type: none"> • No label • Left: The time stamp is located to the left of the values. • Right: The time stamp is located to the right of the values.
Quality Code	Select the position of the quality identifier.

Result

The default parameters of the tags are configured.

Setting the configuration mode for tags

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel and the "Add or edit tags" dialog is displayed.

Procedure

In the "Mode" column, select one of the following configuration modes and make the settings for the selected mode.

- Single value: A tag value is displayed according to the selected mode.
- Time series: The tag values are displayed unchanged or interpolated in a time series.

Configuration mode	Value mode	Description
Single value	Original	"Exact" limit mode: The "Exact" mode shows the exact single value at the selected time.
		"Back" limit mode: "Back" mode searches backwards for the first incoming single value from the specified point in time. The specified time must be specified to the nearest millisecond. The function searches the last 30 minutes from the specified time. If there is no value in this time interval, an empty line is output.
		"Next" limit mode: "Next" mode searches forward for the first incoming single value from the specified point in time. The function searches a maximum of 30 minutes from the specified time. If there is no value in this time interval, an empty line is output.
	Interpolated	"Interpolated" mode calculates the value from the previous and the following value at the selected point in time. If there is a value at the selected time, there is no need to select the mode.
Current	The "Current" mode updates the fixed value in the table for the specified cycle (unit seconds). If the value is set to "0", update the value via "Run".	

Configuration mode	Value mode	Description
Time series	Original	"Inside" limit mode: Contains the values in the specified time interval.
		"Outside" limit mode: Contains the last value before the time interval begins and the next value after the end of the time interval.
		"Back" limit mode: "Back" mode searches backwards for the first incoming single value from the specified point in time. The specified time must be specified to the nearest millisecond. The function searches the last 30 minutes from the specified time. If there is no value in this time interval, an empty line is output.
		"Next" limit mode: "Next" mode searches forward for the first incoming single value from the specified point in time. The function searches a maximum of 30 minutes from the specified time. If there is no value in this time interval, an empty line is output.
	Interpolated	"Interpolated" mode calculates the value from the previous and the following value at the selected point in time. If there is a value at the selected time, there is no need to select this mode. For example, The time interval is one minute, the time interval for interpolation is ten seconds, i.e. six interpolated values, one value per ten seconds.
	Calculated	"Max" calculation method: Determines the minimum value per interval. Select one of the modes under "Time stamp": Start of the interval min/max time stamp.
		"Min" calculation method: Determines the minimum value per interval. Select one of the modes under "Time stamp": Start of the interval min/max time stamp.
		"Mean value" calculation method: forms the arithmetic mean
		"Integral (linear)" calculation method: Forms the integral via the linear interpolation function of the tag
		"Integral (Sample-and-Hold)" calculation method: Forms the integral via the sample-and-hold interpolation function of the tag
		"Sum" calculation method: Calculates the sum of all tag values per interval.

Result

Configuration mode is set.

Deleting a tag

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.
- A report template is open and contains a tag.

Procedure

1. Select "Tags".
The "Add or edit tags" dialog opens.
2. Select the tag you want to delete from the "Selected tags" overview.
3. Select the "Remove" button.

Result

The tag is deleted.

Create messages

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. In the "Excel Workbook" area, select the "Messages" option.
2. Select a project in the "Add or edit messages" dialog.

Note

The last selected project is automatically selected the next time the dialog is opened.

3. To create a default filter for a message, select the "Add message configuration" button.

Note

The filter for the message appears in the "Message configurations" list. One output per filter appears in the Excel worksheet. If you select a filter for a message in the "Message configurations" overview, you can configure the filter directly in the line.

4. Repeat the procedure from step 3 until you have inserted all the desired filters for the messages.
5. Confirm the dialog with "OK".

Note

When you move the mouse pointer over the text field for values in the Excel worksheet, a tooltip informs you of the name of the message block.

Result

The message is created.

Configuring a message

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. In the "Excel Workbook" area, select the "Messages" option.
2. Select a project in the "Add or edit messages" dialog.

Note

The last selected project is automatically selected the next time the dialog is opened.

3. From the "Message Configuration" overview, select the filter for the message that you want to edit.
4. You configure the following standard parameters independent of the mode selected in the message line:
Configuring the standard parameters of the message (Page 190)
5. Select one or more attributes for the message in the "Selected attributes" column.

Note

The attributes are project-dependent. The order of the attributes in the table is referenced by the order of the selection. If you change the order, remove the entire selection and enable it again in the desired order.

6. Use the message filter to select additional filter criteria for the message attributes.
Configuring a message filter (Page 199)

Note

You can use the message filter to define additional criteria for the attributes of the messages. The criteria limit the number of messages displayed.

You have the possibility to configure any number of filters. Select the attribute, operand, and value for one filter per line. You can also use the selection box to define the dependencies between the individual filters.

7. If needed, enable the "Maximum number" option and enter a number.

Note

If the maximum number of values is set, values are output from the beginning of the time interval up to the maximum number. If the maximum number is greater than the number of values present in the time interval, the "Max. number" setting is ignored.

8. Repeat the procedure from step 5 until you have inserted all the desired filters for the messages.

Note

When you move the mouse pointer over the text field for values in the Excel worksheet, a tooltip informs you of the name of the message block.

9. Confirm your changes with "OK".

Result

The message is configured.

See also

Time information (Page 102)

Configuring the standard parameters of the message

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.
- The notification that you want to process is selected in the "Notification configuration" overview.

Procedure

Edit the following standard parameters directly in the line of the message:

Parameter	Description
Name	Name of the message configuration
Start	Select a start date for the message. You can enter absolute and relative times here. The released time information and examples can be found in the section "Time information" (Page 102).
End	Select an end date for the notification. You can enter absolute and relative times here. The released time information and examples can be found in the section "Time information" (Page 102).
Cell reference	Select the target cell for the message in the Excel worksheet. You can click on the button in the "Cell reference" row. The dialog collapses so that you can directly select a cell and the value is applied. Alternatively, enter the value of a cell directly.
Sheet orientation	Select the orientation of the form. <ul style="list-style-type: none"> • Horizontal • Vertical
Labeling	Specify whether and which labels the cells have in the Excel worksheet. The labeling position depends on the sheet orientation (horizontal/vertical). <ul style="list-style-type: none"> • No label • Above (vertical): The names of the columns are above the values. • Below (vertical): The names of the columns are below the values. • Right (horizontal): The names of the columns are to the right of the values. • Left (horizontal): The names of the columns are to the left of the values.

Result

The standard parameters of the messages are edited.

Delete message

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.

Procedure

1. Select "Messages".
The "Add or edit messages" dialog opens.
2. In the "Add or edit messages" dialog, select the message you want to delete from the "Selected messages" overview.
3. Select the "Remove" button in the "Selected messages" overview.

Result

The message is deleted.

Updating an Excel workbook

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.
- A tag or message is inserted in the Excel worksheet.

Procedure

In the "Excel Workbook" area, select the "Run" option to retrieve archive data.

Result

For the configured tags and/or messages, data from the connected data sources are retrieved and displayed.

Display process values graphically

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.

- The Information Server tab is open in Microsoft Excel.
- An Excel worksheet is opened in which process values are available.

Procedure

1. Select the process values and the corresponding time stamps that you want to evaluate graphically.
2. Navigate to the "Insert" tab.
3. In the "Charts" area, select the chart type with which you want to graphically display the process values.
4. Place the inserted chart at the desired position.

Note

If you have selected relative time data, choose "Run" and the process values in the chart are updated.

Result

The process values are displayed graphically.

Opening server settings

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open.
- A connection to the Information Server is established.

Procedure

Select the "Server" option in the "Configuration" area.

Result

The server settings are opened.

Simplified operation

Definition

The following tips to make operation easier apply to the tables in the dialogs "Add or edit tags" and "Add or edit messages".

Filters for the "Message configurations" and "Selected tags" tables

You can filter the tables by name, cell reference or project.

Filter table (Page 194)

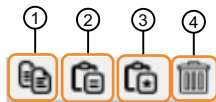
Transfer parameters for several fields in the table

You can match up the parameters for several messages / tags in one step.

Apply parameters (Page 195)

Layout of the buttons for easier operation

The buttons in the dialogs "Add or edit tags" and "Add or edit messages" are located below the tables and are structured as follows:



- | | | |
|---|--------------------------------|--|
| ① | Copy (Page 196) | The message / tag or its configuration is deleted. |
| ② | Paste (Page 196) | The completely copied message / tag is inserted. |
| ③ | Paste configuration (Page 197) | The configuration of the copied message / tag is transferred to the selected message / tag. The name of the message / tag is retained. |
| ④ | Delete (Page 198) | The message / tag is deleted. You can select several lines by holding down the Shift key and delete them all at one time. |

Step-by-step instructions for easier operation

Filter table

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- Several messages / tags are created in the "Add or edit tags" or "Add or edit messages" dialogs.

Procedure

Enter the term you want to filter by in the row:

- Name
- Cell reference
- Project

Result

The filtered results are displayed in the table.

Apply parameters

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- Several messages / tags are created in the "Add or edit tags" or "Add or edit messages" dialogs.

Procedure

1. Select the row in the table for which you want to adapt the parameters.
2. Change a parameter of the message/tags and draw a blue frame in the lower right corner around the field for all fields that adopt the same value.

Result

The input value is copied for the selected fields.

Copy message / tag or its configuration

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- Several messages / tags are created in the "Add or edit tags" or "Add or edit messages" dialogs.

Procedure

1. Select a message / tag.

Note**Multiselection**

You can select several lines for this action by holding down the Shift key.

2. Select the "Copy" button.

Result

The message / tag or its configuration is deleted.

Insert copied message / tag

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- Several messages / tags are created in the "Add or edit tags" or "Add or edit messages" dialogs.

Procedure

1. Select a message / tag.

Note**Multiselection**

You can select several lines for this action by holding down the Shift key.

2. Select the "Paste" button.

Result

The completely copied message / tag is inserted.

Transfer configuration of the copied message / tag

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- Several messages / tags are created in the "Add or edit tags" or "Add or edit messages" dialogs.

Procedure

1. Select a message / tag.

Note**Multiselection**

You can select several lines for this action by holding down the Shift key.

2. Select the "Insert configuration" button.

Result

The configuration of the copied message / tag is transferred to the selected message / tag. The name of the message / tag is retained.

Delete a message / tag

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- Several messages / tags are created in the "Add or edit tags" or "Add or edit messages" dialogs.

Procedure

1. Select a message / tag.

Note

Multiselection

You can select several lines for this action by holding down the Shift key.

2. Select the "Delete" button.

Result

The message / tag is deleted.

Message filters

Definition

The selection of messages from the defined time range can be further limited by message filters. These can be created through message configuration using the "Add" button in the "Message filter" column. In the following dialog, filters can be specified for individual message attributes; a comparison operator and a comparison value is stored for each of these attributes.

Logic operations

By default, these filters are linked with a logical "AND". Alternatively, a logical "OR" can be selected by adapting the type of link between two filters in the "And/Or" column.

Grouping

You have the option of logically grouping sequences of filters. To do this, place a check mark in the first column for the required filters and then press the button labeled "{=" in the column heading.

Note

The grouping is only possible for filters which are directly above one another.

The grouping can be canceled by pressing the "X" button in the colored group marker.

Step-by-step instructions for message filters**Configuring a message filter****Requirement**

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- A connection to the Information Server is established.
- The Information Server tab is open in Microsoft Excel.
- The "Add or edit messages" dialog is opened and a message is created.

Procedure

1. Open the dialog in the Message filter column.
2. In the "Attribute" column, select an attribute as filter criterion.
3. Make the desired entries in the "Operator" and "Value" columns.
4. Link several attributes with operands.

Note

You use conditions to restrict the attributes that are output.

5. Select "Apply" to apply the filter settings for the message block.

Result

The message filter is configured.

	And/Or	Attribute	Operator	Value
<input type="checkbox"/> + <input type="checkbox"/> X <input type="checkbox"/>		Status	=	
<input type="checkbox"/> + <input type="checkbox"/> X <input type="checkbox"/>	And			
<input type="checkbox"/> + <input type="checkbox"/> X <input type="checkbox"/>	And	Process value: 1	=	50

[+ Add new clause](#)

Filter preview:

```
Statustext = " AND PValue1 = 50
```

Apply Cancel

Parameter defaults in Excel

Definition

You have the following options:

- Accept parameter defaults that are already created in the Web application
- Create new parameter presets with the "+" button
- Delete existing parameter presets

Application recommendations

The following functions are available:

Creating parameter presets in Excel (Page 201)

Reusing parameter presets in Excel (Page 201)

Editing parameter presets in Excel (Page 202)

You can find information about creating parameter presets in the Web application under:

Parameter presets (Page 107)

Step-by-step instructions for parameter presets in Excel

Creating parameter presets in Excel

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.

Procedure

1. In the "Create report" dialog, navigate to "Report templates > Templates" in the folder tree.
2. Select the report template for which you want to create the parameter preset.
3. Configure the report.
4. Select "Create parameter presets".
5. Select a name.
6. If you only want to make the presets visible to yourself, enable the "Private" option.

Note

Users of the "SIMATIC Report Administrators" group can view all templates, including private ones.

7. Select "Save".

Result

The parameter preset has been created.

Reusing parameter presets in Excel

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.

3.8 Office add-in

- A connection to the Information Server is established.
- A default parameter setting has already been created for the report.

Procedure

1. In the "Create report" dialog, navigate to "Report templates > Templates" in the folder tree.
2. Select the report template for which you want to copy the parameter settings.
3. From the drop-down list next to "Parameter presets", select the preset.
4. Confirm your selection.

Result

The parameter preset is included in Excel.

Editing parameter presets in Excel

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators
- The Information Server tab is open in Microsoft Excel.
- A connection to the Information Server is established.
- A default parameter setting has already been created for the report.

Procedure

1. In the "Create report" dialog, navigate to "Report templates > Templates" in the folder tree.
2. From the folders, choose a report template for which you have already created parameter presets.
3. From the drop-down list next to "Parameter presets", select "Manage presets".
4. Select the parameter preset that you want to edit.
5. You can edit, delete, or move the saved presets up and down.
6. Select "Save".

Result

The saved parameter presets have been edited.

3.8.7.3 Footer in Excel

Footer in Excel

Definition

The footer shows the connection status of the Office add-in.

There are three different states:

- Connecting: The connection is being established.
- Connected: The connection is established.
- Connection failed: The connection has failed.

Layout

Check the connection status at the left of the footer.



Connected to <https://phis2020:443/>

Checking the connection status (Page 203)

Step-by-step instructions

Checking the connection status

Requirement

- You are a member of one of the following Windows user groups:
 - SIMATIC Report Publishers
 - SIMATIC Report Users
 - SIMATIC Report Administrators

Procedure

Check the connection status in the footer.

- Connecting: The connection is being established.
- Connected: The connection is established.
- Connection failed: The connection has failed.

Note

No connection to the Information Server

If there is no connection to the Information Server, check if an appropriate license is available or if there are network problems. If necessary, repeat the connection procedure.

If there is no connection to the Information Server, the commands in the multifunction toolbar are not activated.

Result

The connection status is checked.