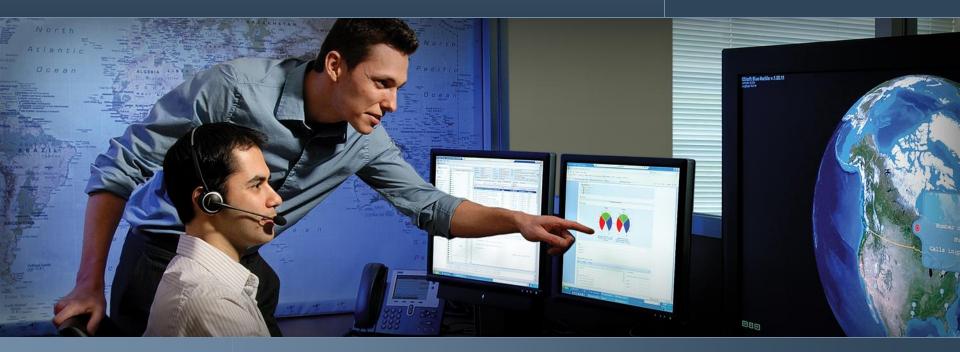


#### Regional Seminar Series Raleigh



Dashboards/Scorecards/KPIs utilizing PIWebParts & Datalink for Excel

Todd Brown Center of Excellence Engineer OSIsoft, LLC.

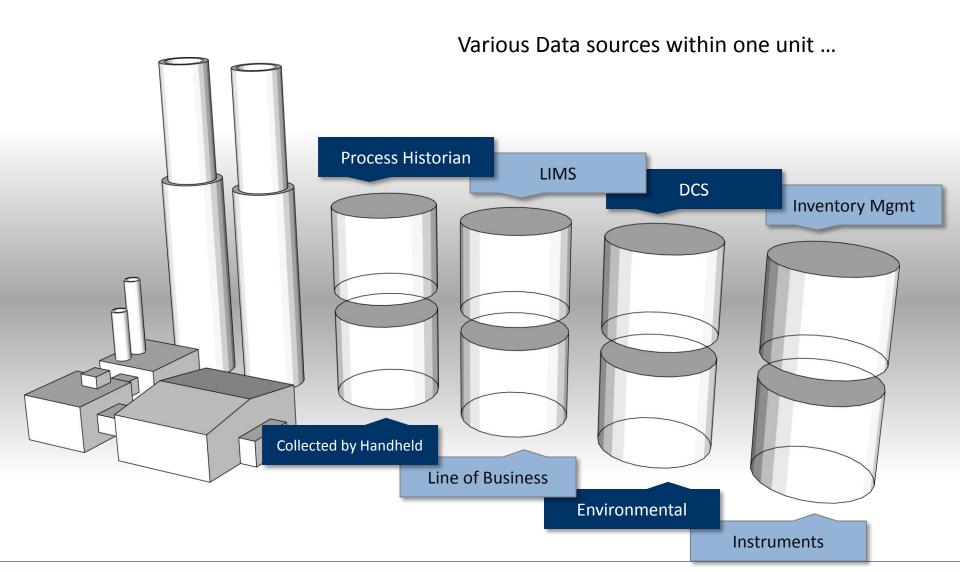
October 27, 2009

# Goals for Today

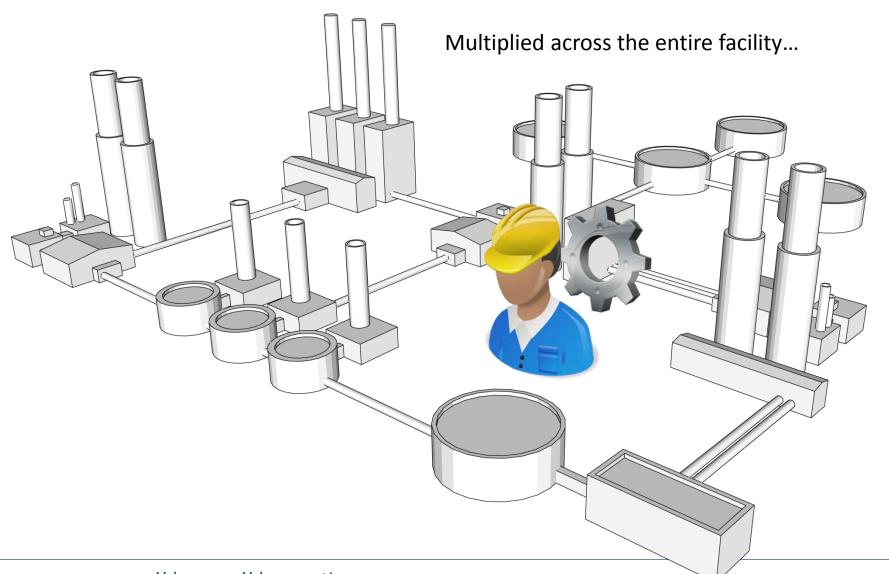


- Learn about the value of Microsoft and OSIsoft integration
- Learn about PIWebParts and Datalink for Excel Services and how they complement each other
- Learn about how batch data can be displayed on the web
- Answer Questions and Inspire Action



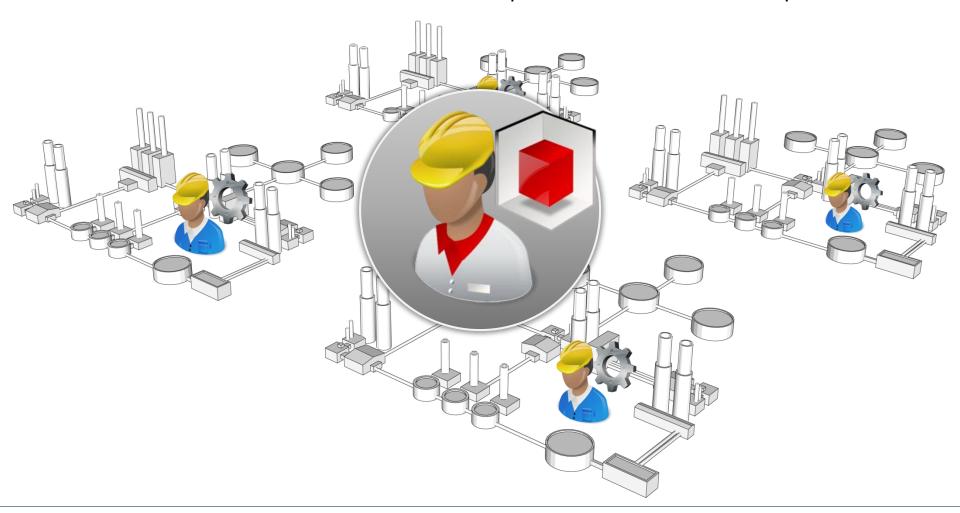






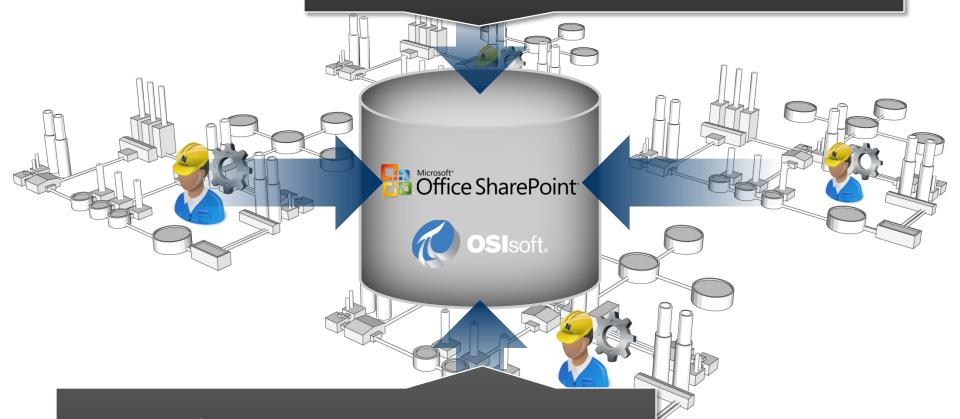


#### Multiplied across the entire enterprise...





OSIsoft PI System, PIWebParts, ProcessBook, & Datalink for automated and centralized data collection and analysis



Microsoft SharePoint, PerformancePoint, and Excel to provide secure, role-based views into data

# PIWebParts & Datalink for Excel Services on Microsoft Office Sharepoint Server (MOSS)



#### Composed of

- PIWebParts Web parts for data visualization
- RtBaseline Services Data access for PIWebParts
  - · PI Data, Relational Data, Web Services Data
- Datalink for Excel Services (DLES) \* thin client web front end to Datalink/Batchview reports authored in Excel
- Rich Client Applications Authoring environment (ProcessBook, Datalink, Batchview)

#### Requires

- Windows Server 2003
- Windows SharePoint Services 3.0
- SQL Server 2005 or SQL Express 2005 (can be on separate box)

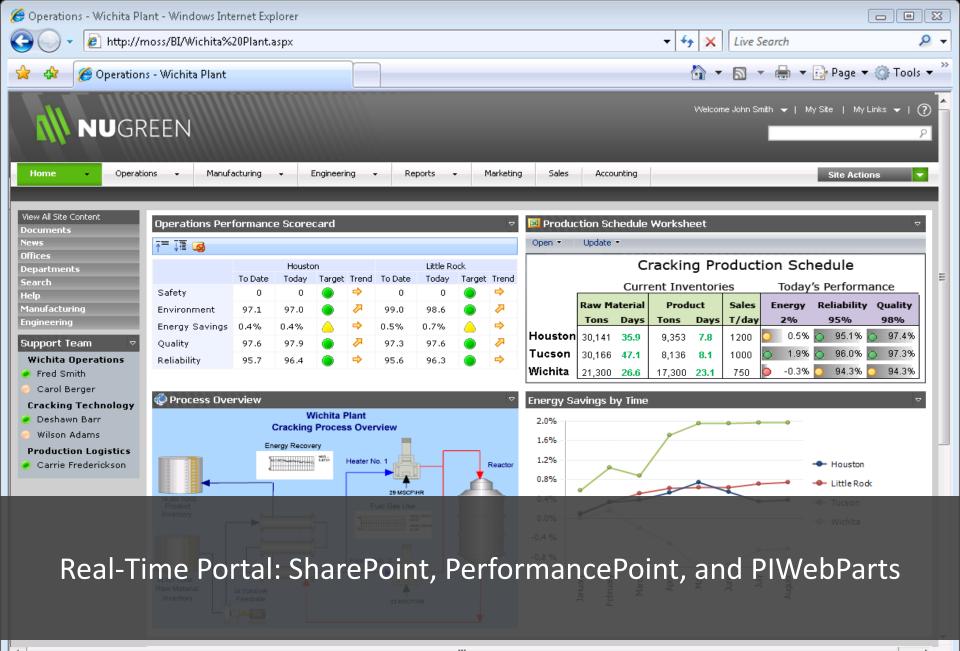
#### Optional

- \* Microsoft Office SharePoint Server (MOSS) Enterprise Edition (<u>required</u> for Datalink for Excel Services, DLES)
- Live Communications Server
- Office 2007

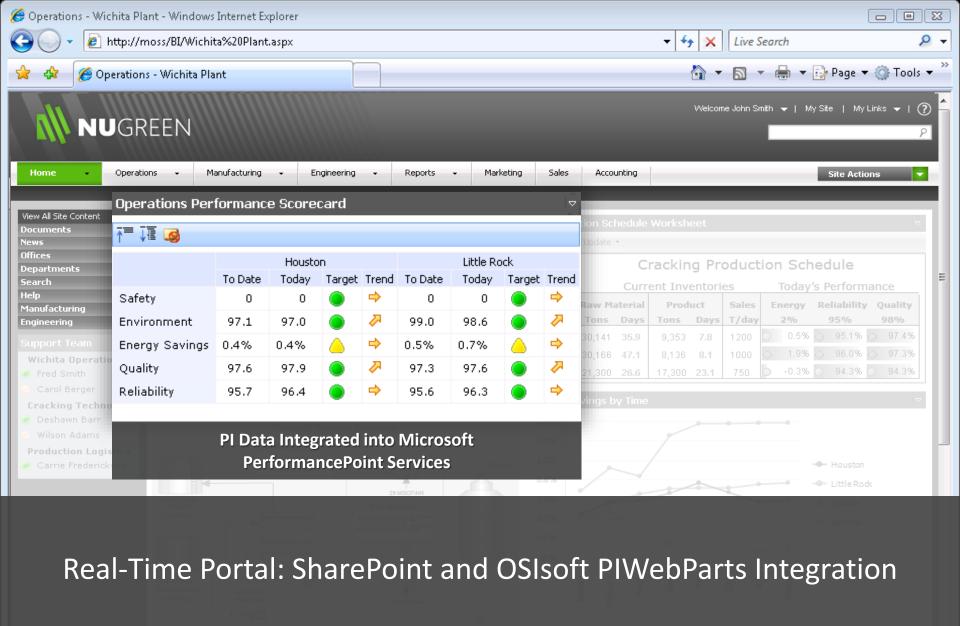
#### PIWebParts 2.2 & Datalink for Excel Services



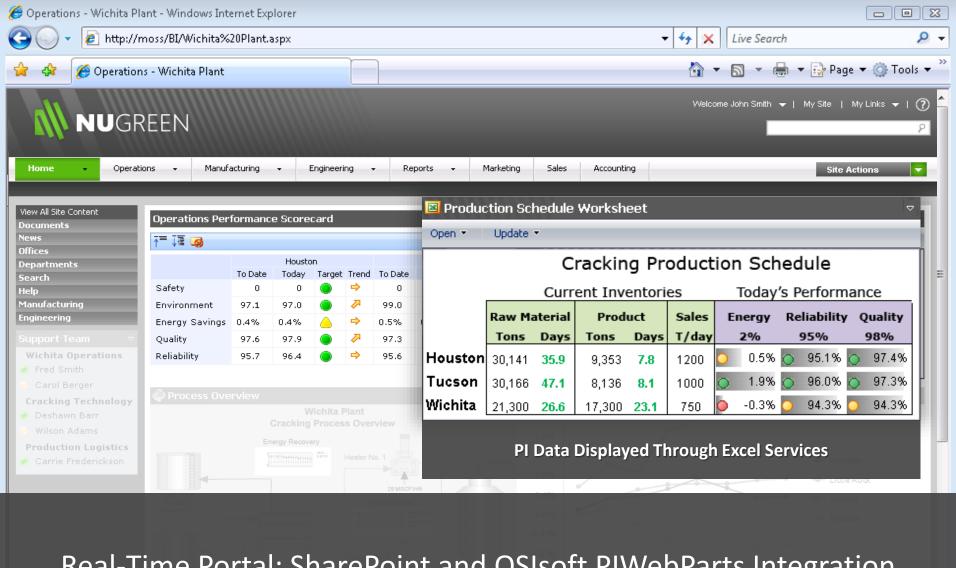






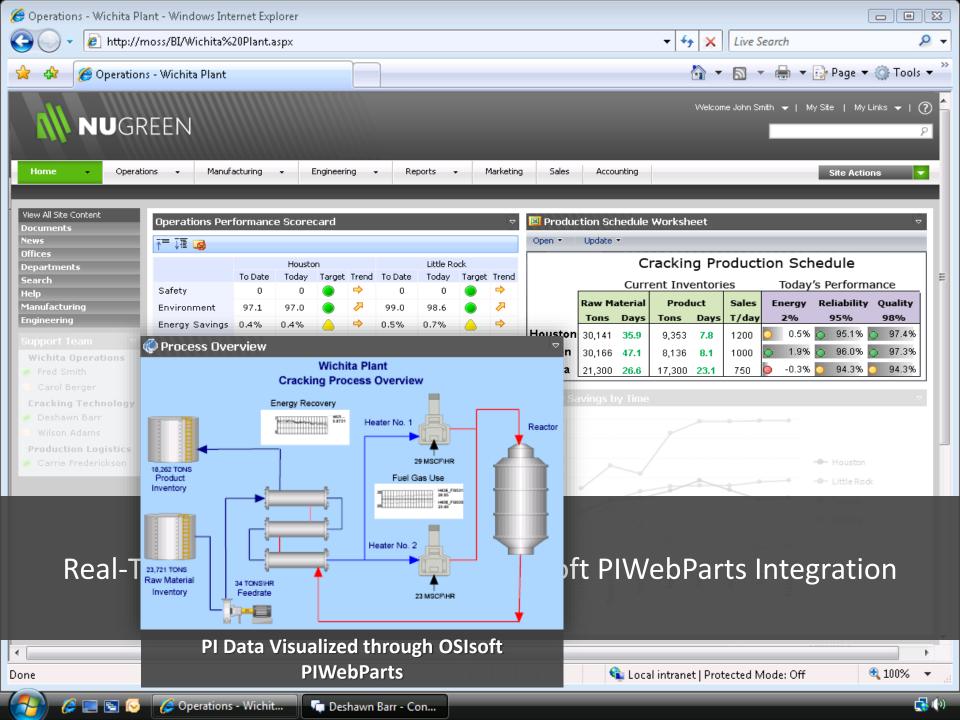


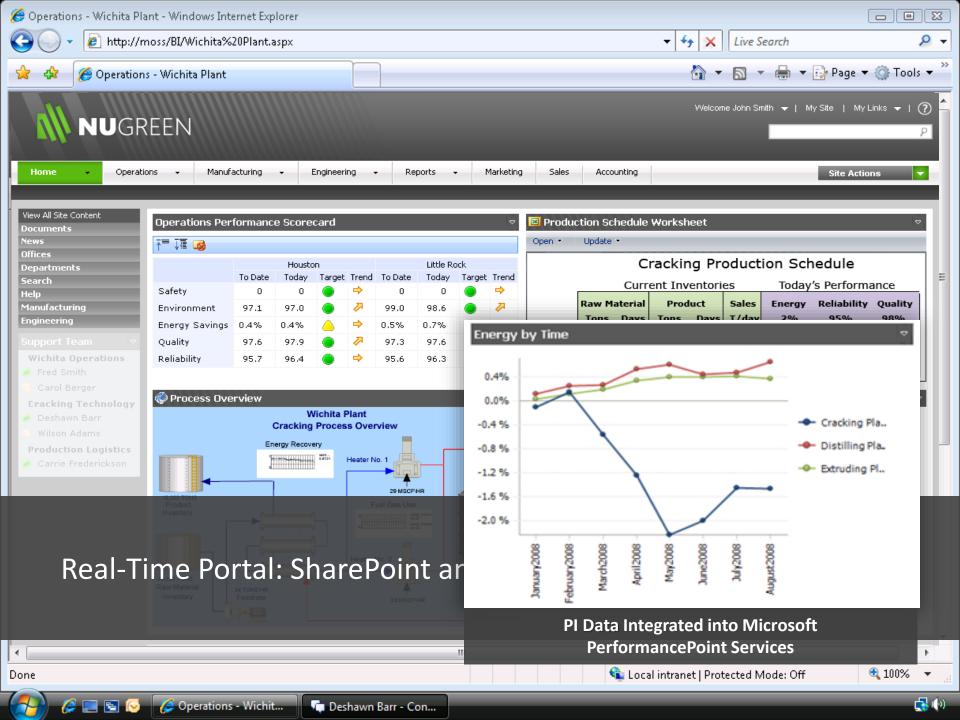


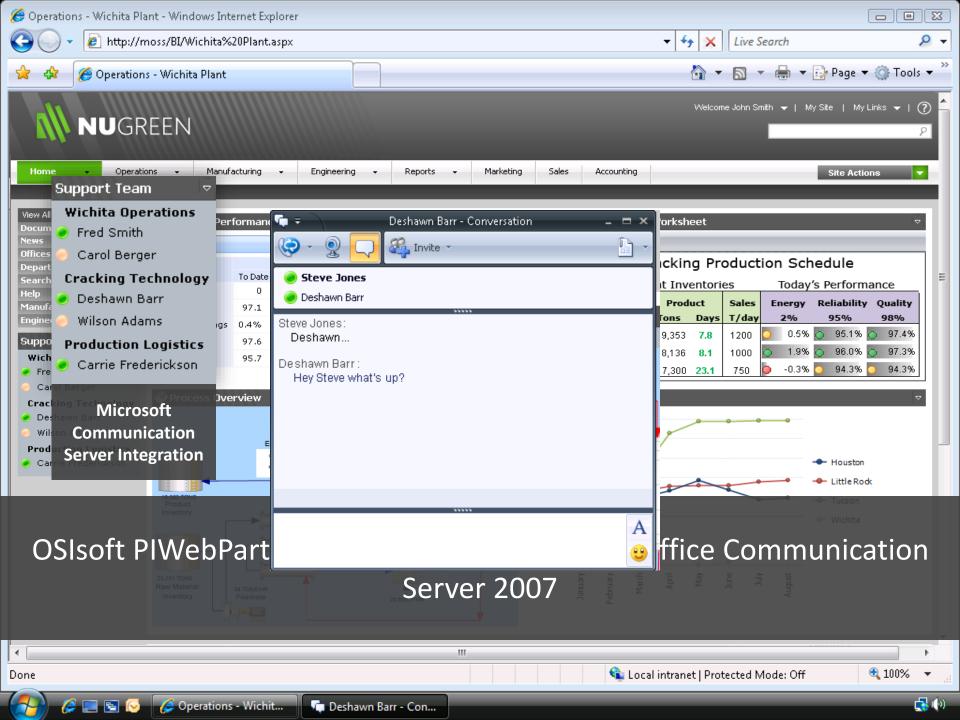


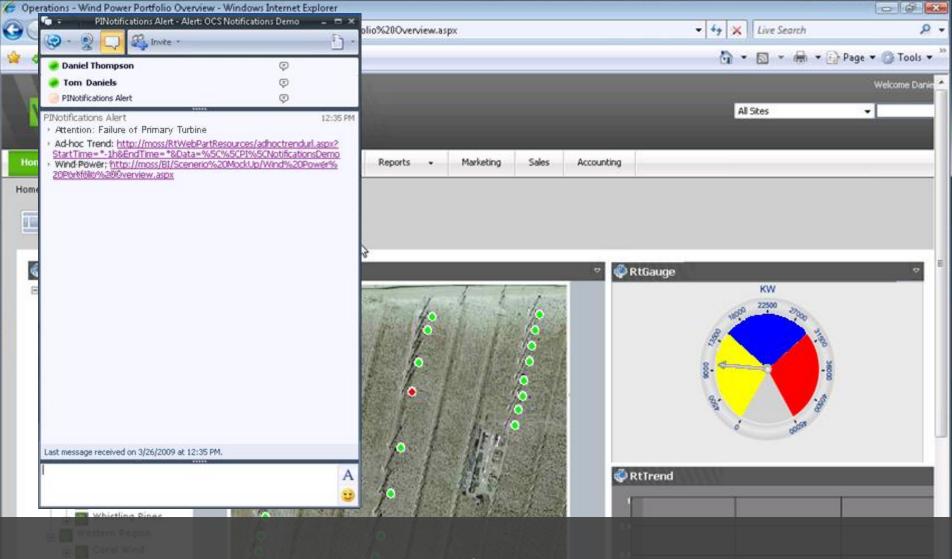
#### Real-Time Portal: SharePoint and OSIsoft PIWebParts Integration



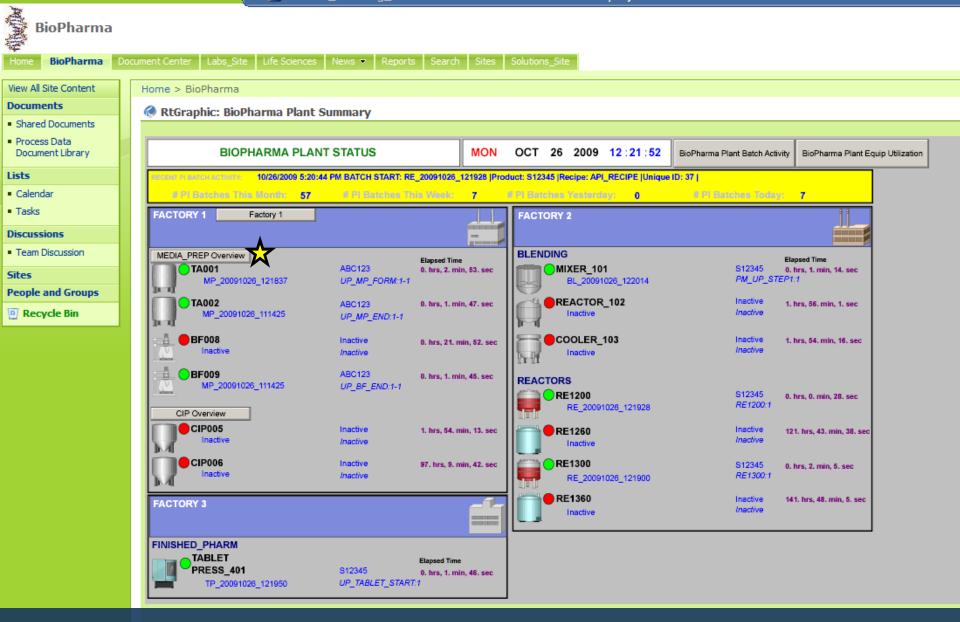




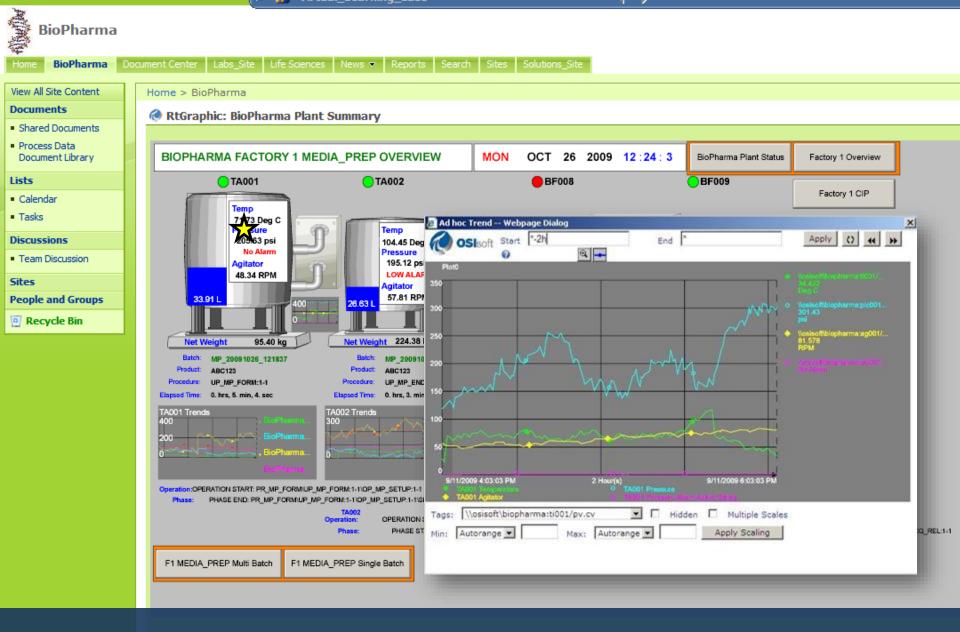




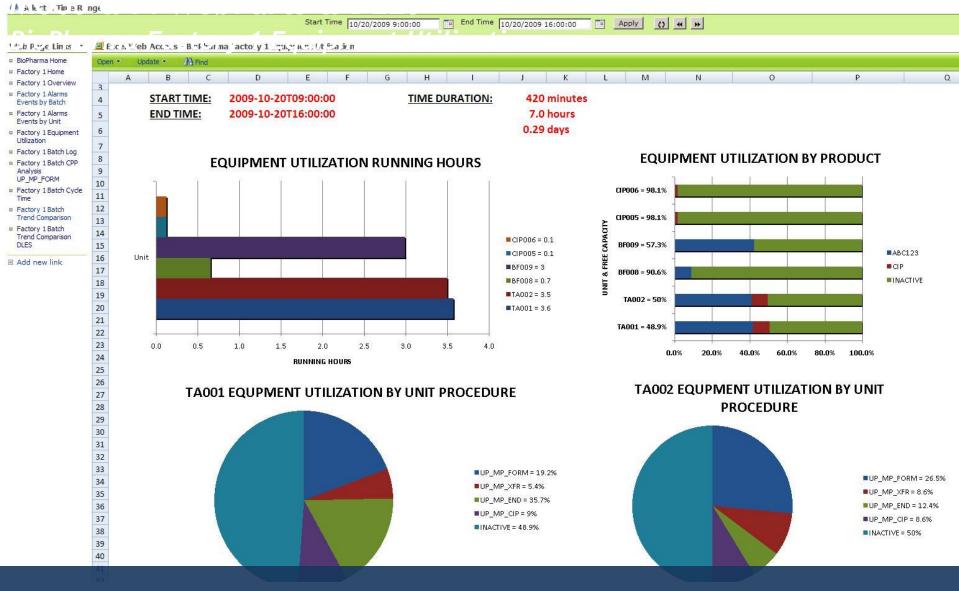
# PI Notifications: Delivery Through Microsoft Office Communication Server 2007



#### Current Batch Production Status Across Different Sites or Factories



#### Drill Down Into a Process Area for More Details

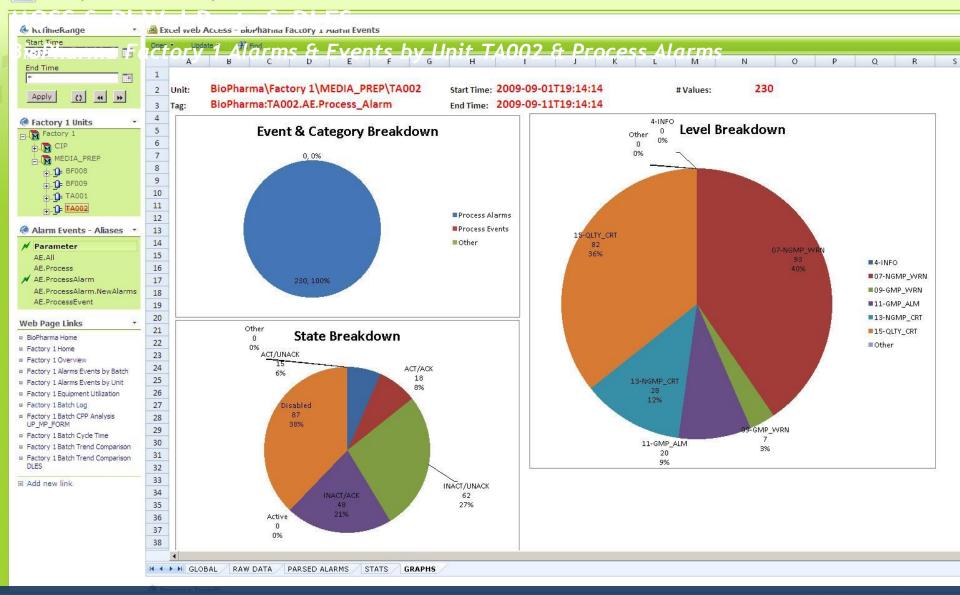


Factory 1 Equipment Utilization

Factory 1 Equipment Utilization History

#### Alarms & Events Rollup KPIs by Unit TA001

Factory 1 > Process Data Document Library > Factory 1 Alarms Events by Unit

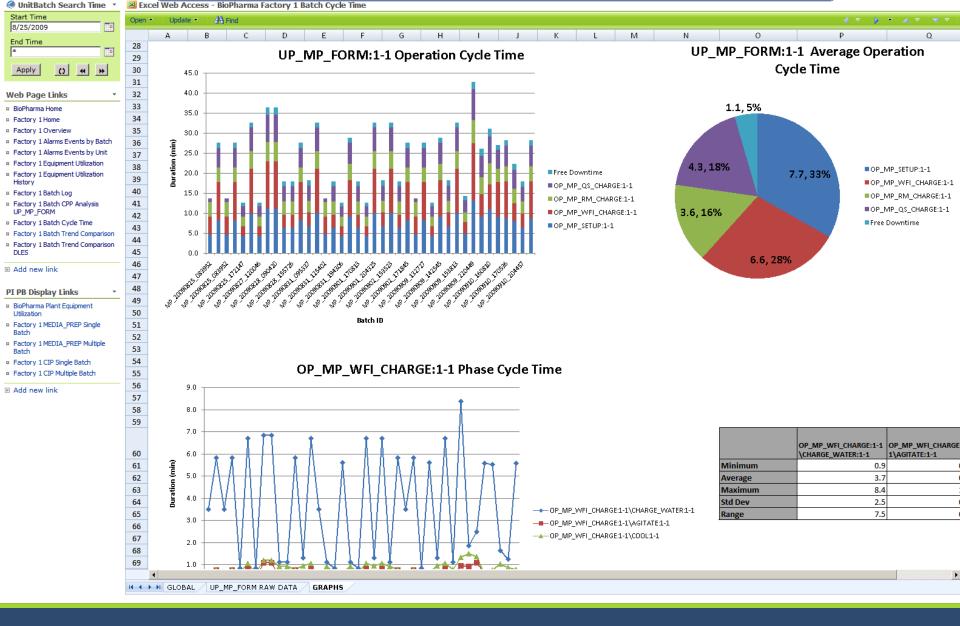


#### Alarms & Events Rollup KPIs by Unit TA002 & Process Alarms

#### A.T.m.eRange LI Excel Mediacoss BioFharma Factory 1 /Jarm Events Start Time \*-10d M A ▼ TIMESTAMP (416 VALUES ▼ EVENT ▼ CATEGOI ▼ AREA - UNIT ▼ MODULE ▼ MODULEDESC **▼** ATTRIBUTE **▼** STATE **▼ LEVEL** ▼ DESC1 ▼ DESC2 01-Sep-09 20:44:45 PROCESS MEDIA PREP TA002 TA002 HIST TA002 PLC HIST W\_7852\_ALM INACT/UNACK 11-GMP ALM CFN Change From Normal Value 0 4 2 01-Sep-09 20:46:29 NEW VALUE = OPEN CHANGE USER MEDIA PREP TA002 HS002 002 CLEAN DRY AIR VALVE DC1/SP D.CV DOLANMIC HS002\_105 01-Sep-09 20:48:13 PROCESS MEDIA PREP TA002 VENT FILTER VALVE LIMIT SWITCH DISABLED 07-NGMP WRN LMSW FAIL Limit Switch Failed Factory 1 Units PROCESS Low Alarm Value 33,3883 Li 4 01-Sep-09 20:49:57 MEDIA PREP TA002 PI002 009 **BAG FILLER PRESSURE** LO\_ALM INACT/ACK LOW Factory 1 01-Sep-09 20:51:41 PROCESS TA002 LVL MEDIA PREP TA002 L1002 002 LO LO ALM ACT/ACK Low Low Alarm Value 5.41 E CIP 01-Sep-09 20:53:25 **PROCESS** MEDIA PREP TA002 PI002 010 N2 PRESS TO AMB STORAGE HI ALM 07-NGMP WRN HIGH High Alarm Value 30.0022 L MEDIA\_PREP 01-Sep-09 20:55:09 PROCESS MEDIA PREP TA002 L1002 002 LO LO ALM ACT/ACK Low Low Alarm Value 5.41 ⊕ **Q**= BF008 9 01-Sep-09 20:56:53 **PROCESS** MEDIA PREP TA002 TIC002 002 BIOWST 1 PMP RECIRC TEMP HI ALM DISABLED 07-NGMP WRN HIGH High Alarm Value 87,0746 L 01-Sep-09 20:58:37 PROCESS MEDIA PREP TA002 PIC002 002 HWFI LOOP 1 RETURN PRESS INACT/UNACK 11-GMP ALM Low Alarm Value 45,5523 Li LO ALM ± 10 TA001 PROCESS 11 10 01-Sep-09 21:00:21 MEDIA PREP TA002 HS002 030 CLEAN STEAM TO HE-002 INTERLOCK 13-NGMP CRT INTERLOCK Interlock Active INACT/UNACK ± 1 TA002 11 01-Sep-09 21:02:07 EVENT PROCESS MEDIA PREP TA002 TI002 101 TA002 TEMP ACTIVE TI002 101/AI1 Module Failure Active 13 12 01-Sep-09 21:03:51 PROCESS MEDIA PREP TA002 AG0321 TA002 AGITATOR MOTOR STATUS DISABLED 07-NGMP WRN MS FAIL Motor Status Failed Alarm Events - Aliases PROCESS 13 01-Sep-09 21:05:35 MEDIA\_PREP\_TA002 LAH002 002 PROC WASTE SUMP HIGH LVL DISC\_ALM INACT/ACK Change From Normal Value ✓ Parameter 15 14 01-Sep-09 21:07:19 EVENT PROCESS MEDIA PREP TA002 TA002 HIST TA002 PLC HIST T 7620 ALM ACT/ACK Change From Normal Value ✓ AE.AII 15 01-Sep-09 21:09:03 **PROCESS** MEDIA PREP TA002 HS002 105 VENT FILTER VALVE LIMIT SWITCH DISABLED 07-NGMP WRN LMSW FAIL Limit Switch Failed AE.Process 16 01-Sep-09 21:10:47 PROCESS MEDIA PREP TA002 TA002 EM IITA002 INLET EM FAIL\_ALM ACT/ACK FAIL ALM Failure Alarm AE.ProcessAlarm 17 01-Sep-09 21:12:31 PROCESS MEDIA PREP TA002 DISABLED 07-NGMP WRN HIGH High Alarm Value 87.0746 AE.ProcessAlarm.NewAlarms 19 01-Sep-09 21-14-15 Module Failure Active AE.ProcessEvent 20 19 01-Sep-09 Low Alarm Value 89.633 Lin You can have another similar display for Alarms by BATCH Web Page Links 21 20 01-Sep-09 Limit Switch Failed BioPharma Home Change From Normal Value 01-Sep-09 21:21:11 PROCESS MEDIA PREP TA002 TIC002 002 BIOWST 1 PMP RECIRC TEMP HI ALM 07-NGMP WRN HIGH High Alarm Value 87.0746 L ■ Factory 1 Home DISABLED ■ Factory 1 Overview 23 01-Sep-09 21:22:55 INSTRUMEN MEDIA PREP TA002 TI002 101 Media TANK TEMP PVBAD ALM DISABLED 07-NGMP WRN IOF General I/O Failure Factory 1 Alarms Events by Batch 24 01-Sep-09 21:24:39 **PROCESS** MEDIA PREP TA002 AG002 TA002 AGITATOR MOTOR STATUS DISABLED 07-NGMP WRN MS FAIL Motor Status Failed Factory 1 Alarms Events by Unit 25 01-Sep-09 21:26:23 **EVENT** PROCESS MEDIA PREP TA002 TA002 HIST TA002 PLC HIST F 9000 ALM ACT/ACK Change From Normal Value ■ Factory 1 Equipment Utilization 26 01-Sep-09 21:28:07 **EVENT** PROCESS MEDIA PREP TA002 TI002 101 Media TANK TEMP ACTIVE 4-INFO TI002 101/AI1 Module Failure Active ■ Factory 1 Batch Log 27 01-Sep-09 21:29:51 **EVENT** SYSTEM MEDIA PREP TA002 TA0002 Media Prep Tank TA0002 Unit ACQ REL ALM DISABLED ANY Any Alarm Value %P1 ■ Factory 1 Batch CPP Analysis 28 01-Sep-09 21:31:35 PROCESS MEDIA PREP TA002 LAH002\_002 PROC WASTE SUMP HIGH LVL DISC ALM INACT/ACK CFN Change From Normal Value UP\_MP\_FORM □ Factory 1 Batch Cycle Time PROCESS 29 01-Sep-09 21:33:19 MEDIA\_PREP TA002 L1002\_002 TA002 LVL LO\_ALM INACT/ACK LOW Low Alarm Value 20.53 Limi Factory 1 Batch Trend Comparison PROCESS 31 30 01-Sep-09 21:35:03 **EVENT** MEDIA\_PREP\_TA002 TA002\_HIST TA002 PLC HIST T\_7620\_ALM ACT/ACK CFN Change From Normal Value Factory 1 Batch Trend Comparison 31 01-Sep-09 21:36:48 CHANGE USER MEDIA\_PREP TA002 HS002\_105 VENT FILTER VALVE DC1/SP\_D.CV INGRAMMA NEW VALUE = CLOSE 33 32 01-Sep-09 21:38:33 **EVENT** PROCESS MEDIA\_PREP TA002 TA002\_HIST\_TA002 PLC HIST W\_7650\_ALM ACT/ACK CFN Change From Normal Value Add new link 34 **PROCESS** 33 01-Sep-09 21:40:17 MEDIA\_PREP TA002 HS002\_030 CLEAN STEAM TO HE-002 INTERLOCK INACT/UNACK 13-NGMP\_CRT INTERLOCK Interlock Active PROCESS 35 01-Sep-09 21:42:01 MEDIA\_PREP TA002 AG002 TA002 AGITATOR MOTOR\_STATUS DISABLED 07-NGMP WRN MS FAIL Motor Status Failed 36 PROCESS 07-NGMP WRN HIGH 35 01-Sep-09 21:43:45 MEDIA PREP TA002 TIC002 002 BIOWST 1 PMP RECIRC TEMP HI\_ALM DISABLED High Alarm Value 87.0746 L 37 **PROCESS** 36 01-Sep-09 21:45:29 MEDIA\_PREP TA002 TA002 HIST TA002 PLC HIST T\_5372\_ALM INACT/UNACK Change From Normal Value 37 01-Sep-09 21:47:13 PROCESS MEDIA PREP TA002 TA002 HIST TA002 PLC HIST F 6751 ALM Change From Normal Value 01-Sen-09 21:48:57 Limit Switch Failer

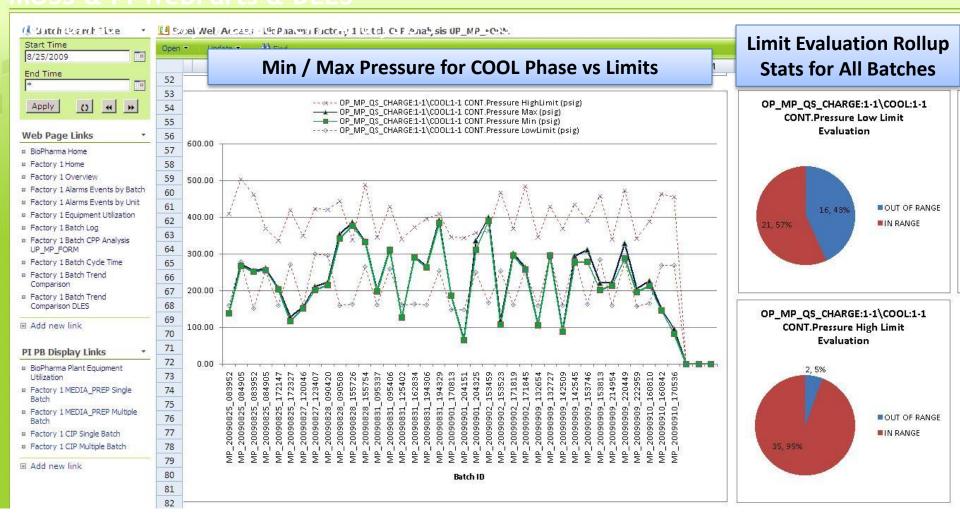
#### Alarms & Events (Parsed Detailed Data with Conditional Formatting)

Factory 1



### Batch Cycle Time (Across a Range of Batches)

#### Factory 1 Batth CFP analysis LiP\_MF\_FORM



#### Batch Critical Process Parameter Analysis (Across a Range of Batches)

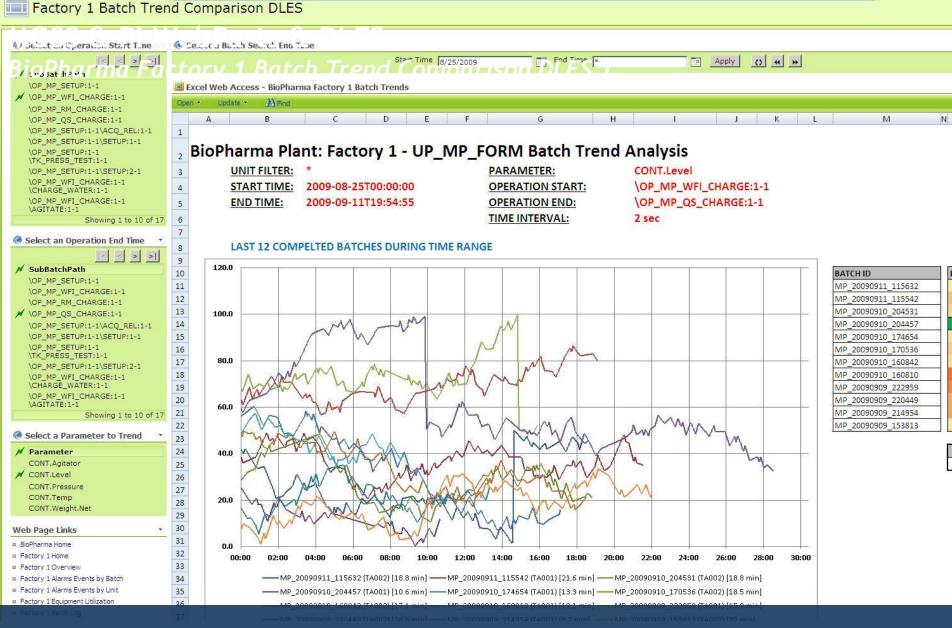
**X Axis** = Agitator Avg from WFI CHARGE\AGITATE Phase

Y Axis = Temp Avg from WFI\_CHARGE\COOL Phase

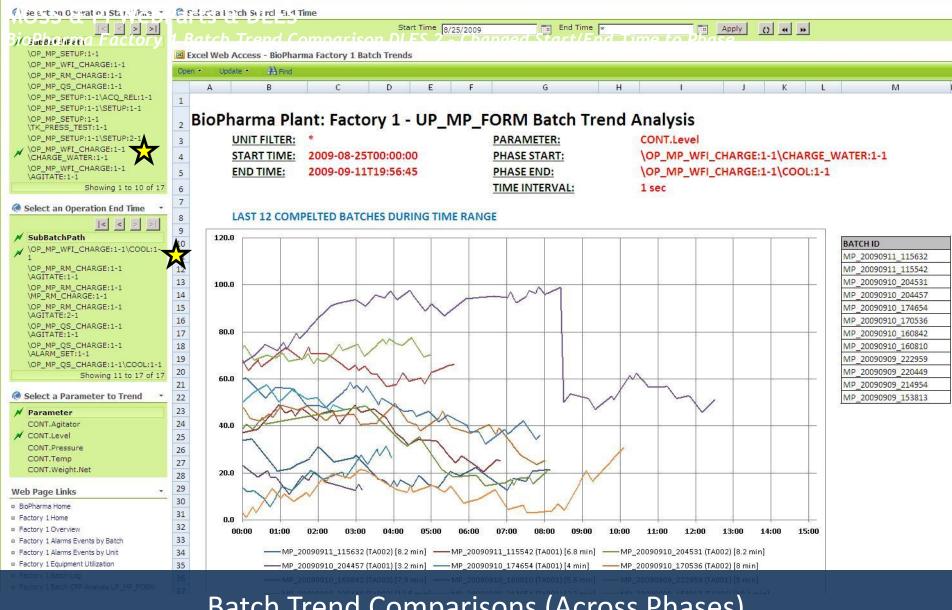
Factory 1 > Process Data Document Library > Factory 1 Batch CPP Analysis UP\_MP\_FORM

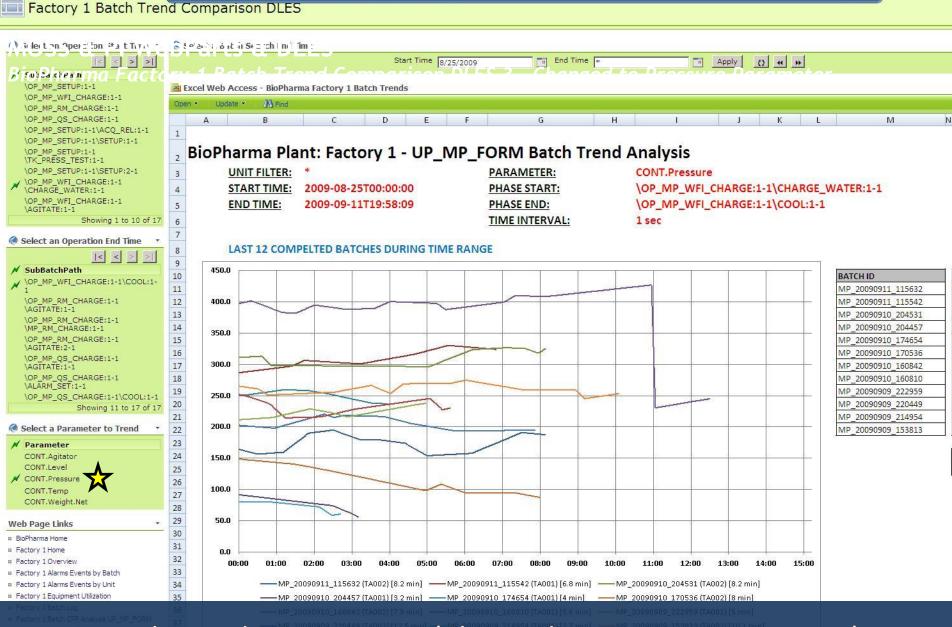
**Bubble Size** = Charge Material from MP\_RM\_CHARGE Phase (Small = *Material A*, Large = *Material B*)

#### Batch CPP Analysis XY Bubble Chart (Across a Range of Batches)



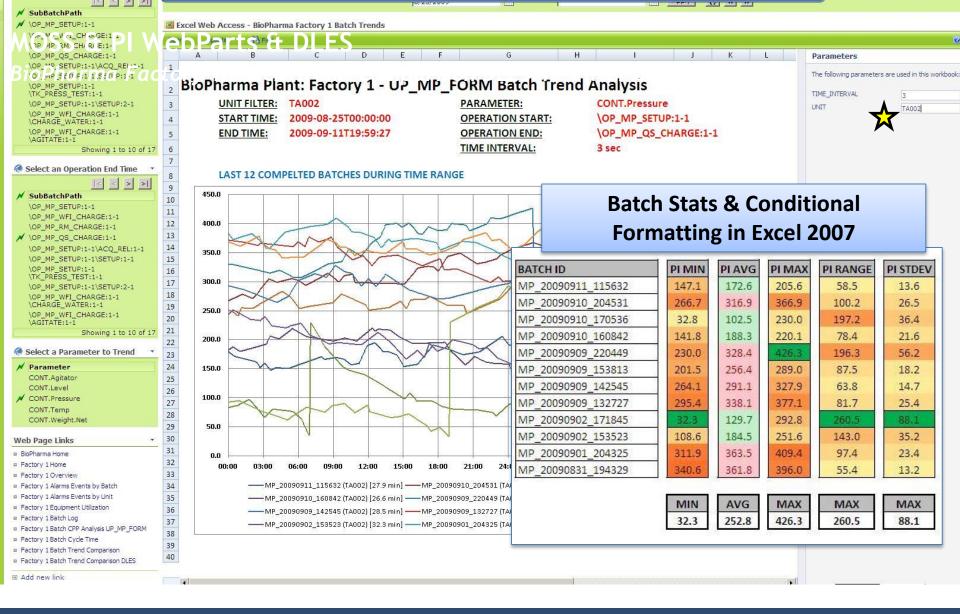
#### Batch Trend Comparisons (Across Operations)





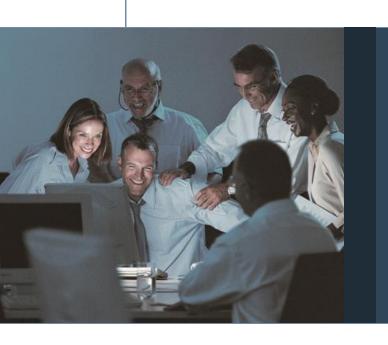
#### Batch Trend Comparisons (Changed Parameter to Pressure)

Virtual\_Learning\_Labs virtual\_Learning\_Labs



#### Batch Trend Comparisons (Filter on TA002 Unit Batches)





# Conclusions

### **Conclusions and Key Takeaways**



MOSS & PIWebParts
Provides Instant Access to
Real-Time and Historical
Information



PI Datalink for Excel Services Unlocks Additional Value



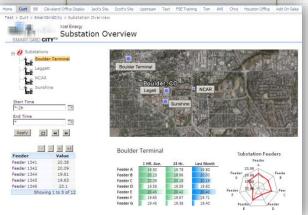
Additional OSIsoft &
Microsoft Integration
Significantly Raises the Bar

- Increases Enterprise
   Visibility of Assets &
   Plant Floor Data
- Facilitates
   Communication &
   Collaboration
- RIGHT data, RIGHT CONTEXT, in REAL-TIME
- Familiar and Dynamic User Interface Increases User Adoption
- Configuration Based Solution

- Equipment & Batch Based Reports exposed through web browser
- Integrates easily with PIWebParts
- Leverage Excel 2007 Conditional Formatting & Graphics to identify process trends
- Configuration Based Solution
- <u>Excel Services Requires</u> <u>MOSS Enterprise</u>

- Integration with BI Platform: Analysis Services & PerformancePoint Services
- PI Notifications and Office Communications Server
- SharePoint Enterprise Search
- InfoPath Forms Server
- SharePoint Business Data Catalog









# Thank you

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