# Migrating from PI ProcessBook to PI Vision - Best Practices

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Gregory Sorin, Customer Success Manager

OSIsoft.


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# Agenda

01 What is PI Vision? What is the PI ProcessBook to PI Vision 2019 Migration Utility?

02 Demo of Migration Utility

03 Building an Upgrade Strategy

04 What's Coming in PI Vision 2020


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# PI Vision

*The fastest, easiest way to visualize PI System data*

- An easy to use, self-service, scalable solution
- Access data from any web browser, including mobile device browsers
- Organize and share displays across your organization

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# Benefits of PI Vision

## Easy to Use

### Intuitive Interface
Easy to use interface that shortens the learning curve

### Dynamic Displays
Displays automatically populate with relevant asset-centric data

### Easy Display Navigation
Easily explore, navigate, and drill-in from one display to another

## Self-Service

### Quick Access to Data
Contextualized data makes it easy for any operator or engineer to quickly find the data they need

### Fast Display Building
Quickly build your own displays without relying on other business groups

### Mobile Capabilities
View and interact with displays in a web browser on any device

## Scalable

### Reduce Number of Displays
With related assets, simply build a single display and reuse it for other assets with the click of a button

### Display Organization
Easily organize and manage your displays using folders

### Rapid Deployment and Roll-Out
Web server deployment makes it easy to rollout to many users quickly


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# PI Vision 2019

Released

PI ProcessBook Migration

Ad Hoc Trending

Streamlined Security for XY Plot and Events Table

21 feedback items addressed

feedback.osisoft.com


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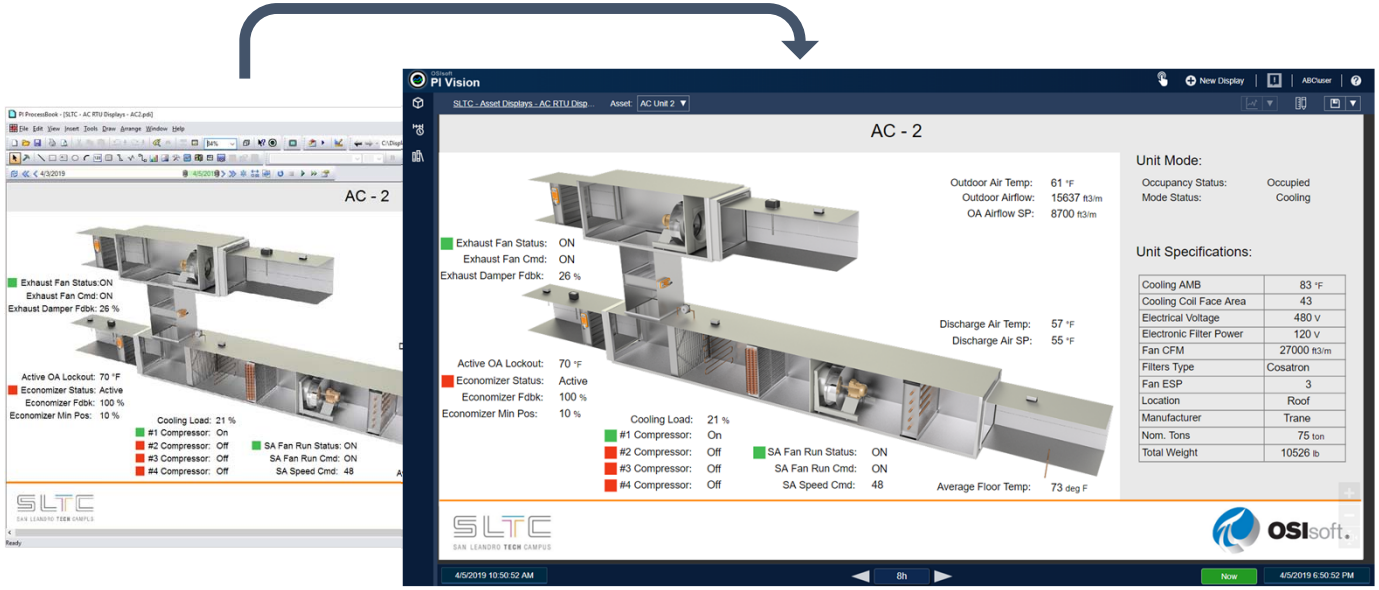
# PI ProcessBook Migration

*Accelerate your path to the latest visualization tool*

1. Select
2. Analyze
3. Migrate





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# DEMO

## PI ProcessBook to PI Vision 2019 Migration Utility


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# BEST PRACTICES

## People
- Subject Matter Experts
- Training
- Communication
- Manage Expectations

## Process
- Goals
- Scope
- Change Management

## Technology
- Modern PI System
- Migration Utility
- Power BI
- Text Editor
- PB Support Tool


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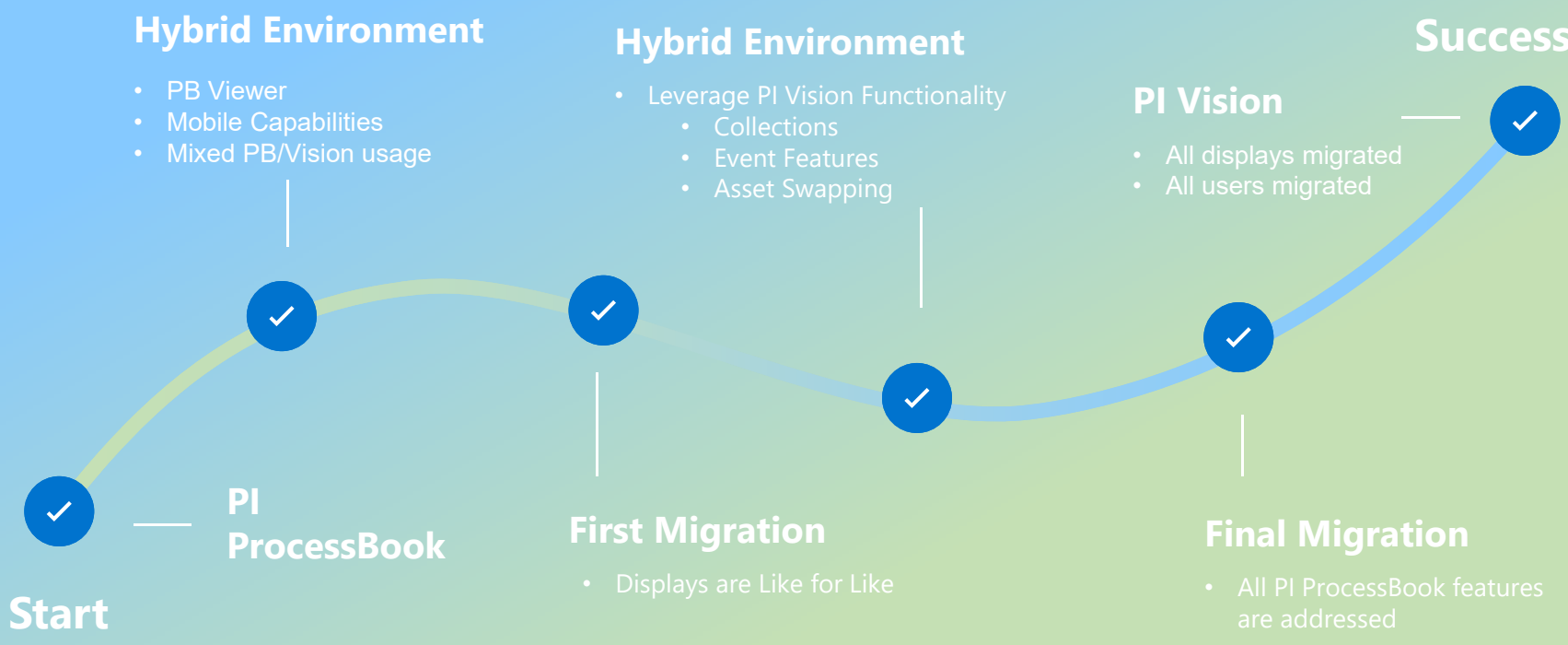
# Define Your Journey





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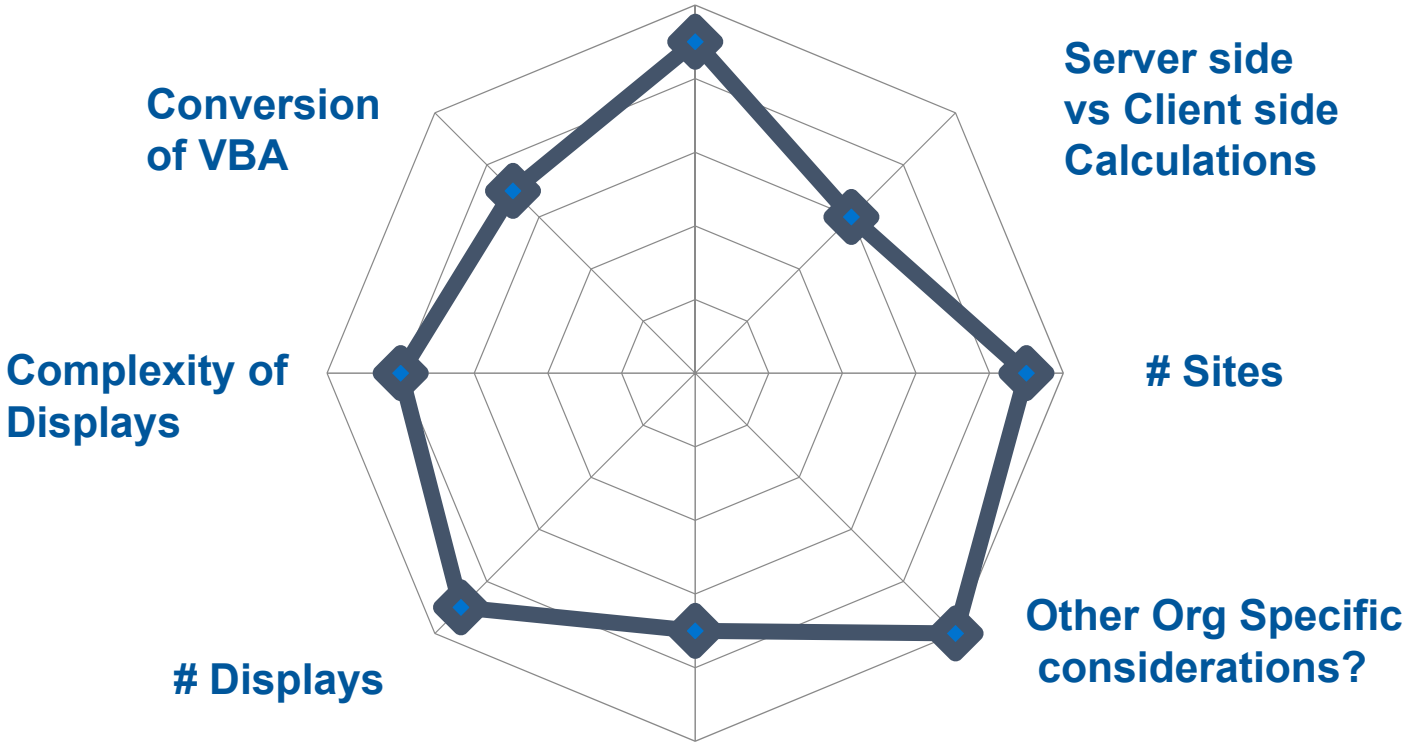
# Define Scope




**Hint: Retire PI ProcessBook displays that are no longer used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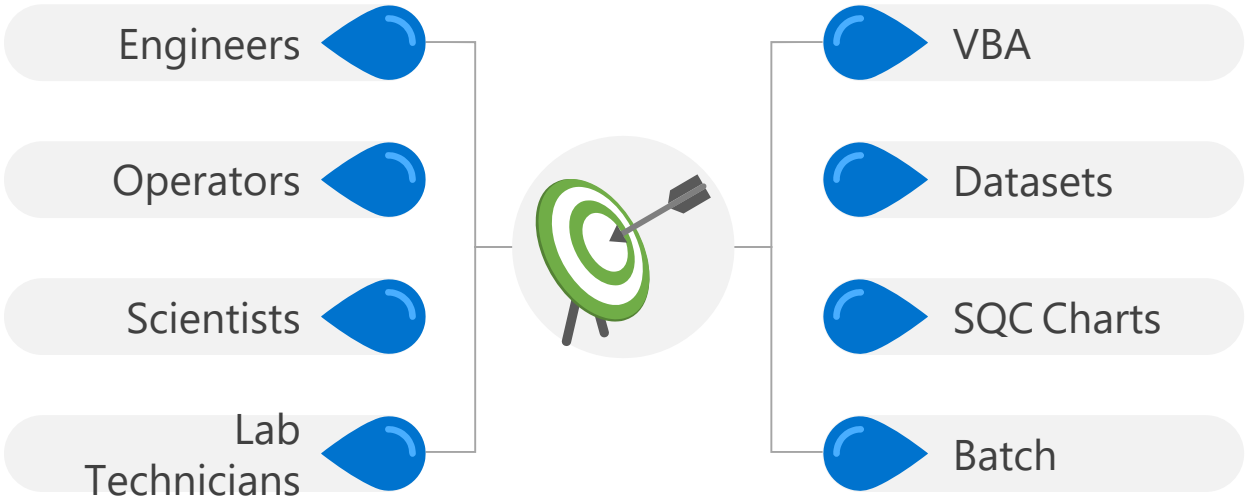
# Identify Subject Matter Experts





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# Engage Your Organization

## Communication

- Share the Plan
  - Phases
  - Timeline
- Technical Differences

## Training

- Classroom
- On-Line Courses
- OSIsoft YouTube Channel
- Lunch and Learns

## Expectation Management

- Messaging from Management
- Engage Power Users


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# Define Change Management

## Displays

**Establish process** to update a published display.

Identify **who has access** to edit.

Define **frequency/ cadence** of changes.

## AF Model

**Establish process** to update the AF Model.

Identify **who has access** to edit.

Define **frequency/cadence** of changes.

## AF Analytics

**Establish process** to update the AF Analyses.

Identify **who has access** to edit.

Define **frequency/cadence** of changes.


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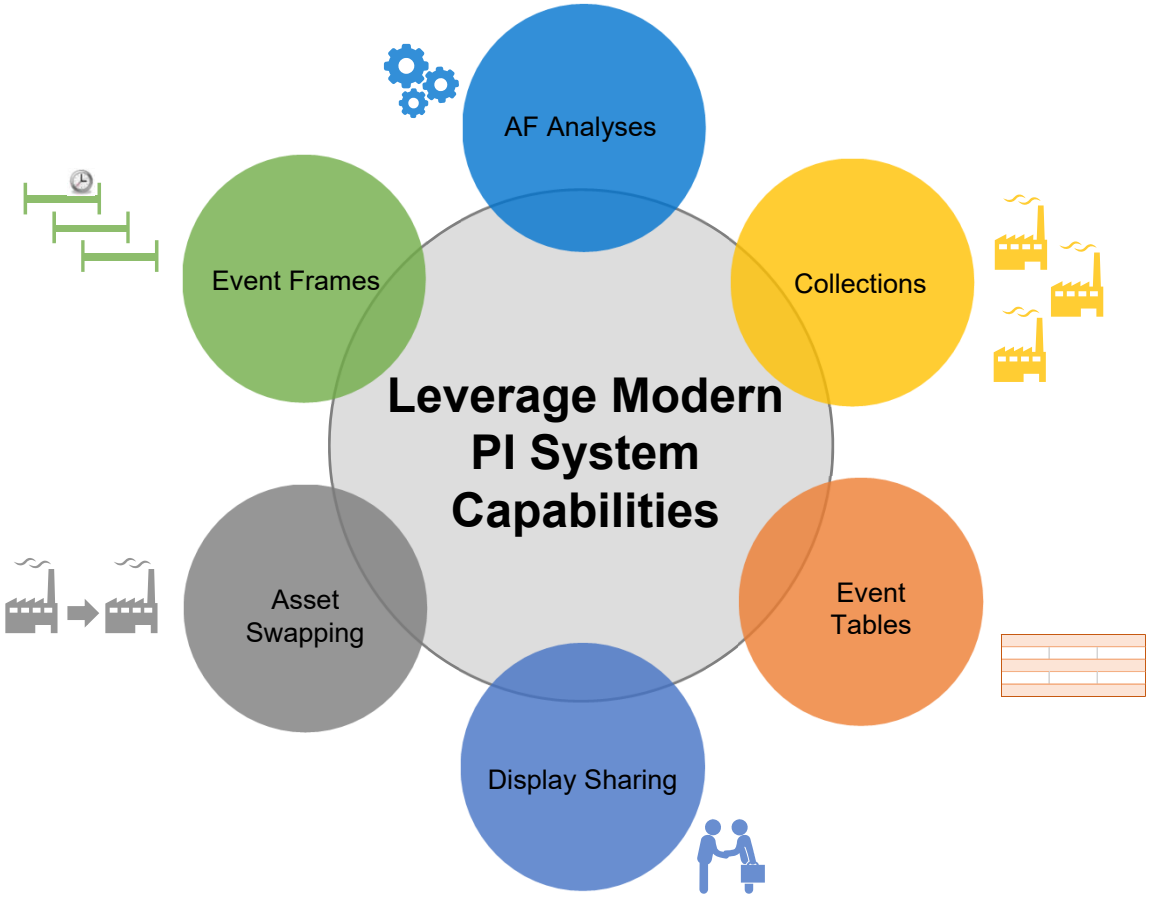


…and more!


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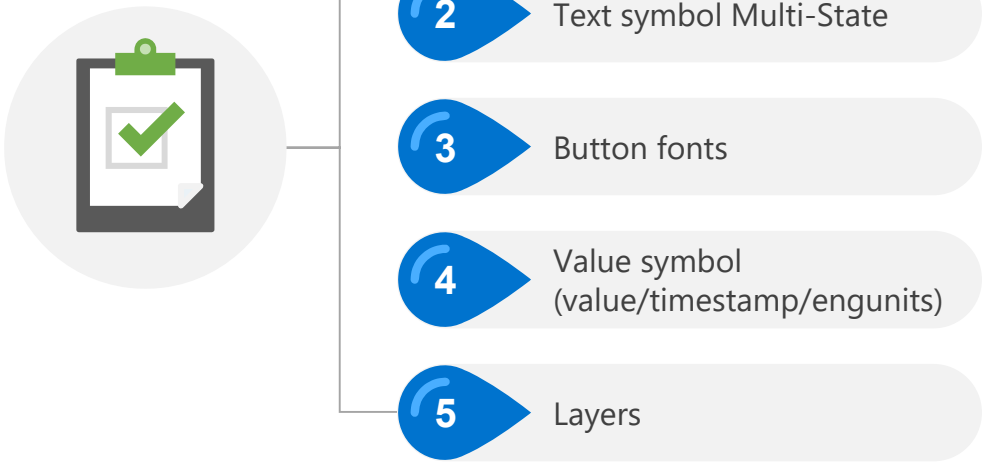
# Update Your PI ProcessBook Displays





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# Leverage These Tools

| Dev/Test | Migration Utility | Power BI | Text Reader | PB Support Tool |
|---|---|---|---|---|
| Dev or Test Environment<br><br>PI Vision 2019 (or later) | Create Analysis Report<br><br>Migrate Displays | Analyze the Migration Analysis Report | Review the VBA content | Upgrade PI ProcessBook files to minimum version 3.0.15.7 |


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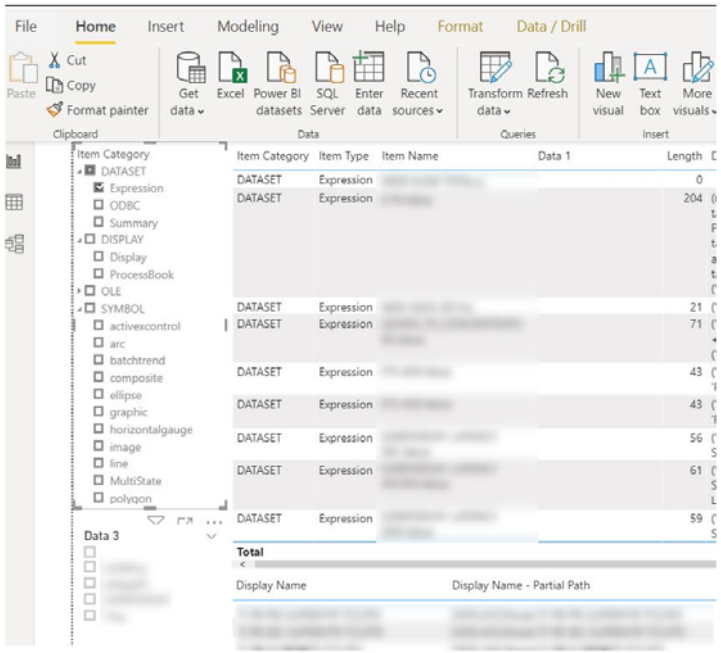
# Leverage Power BI





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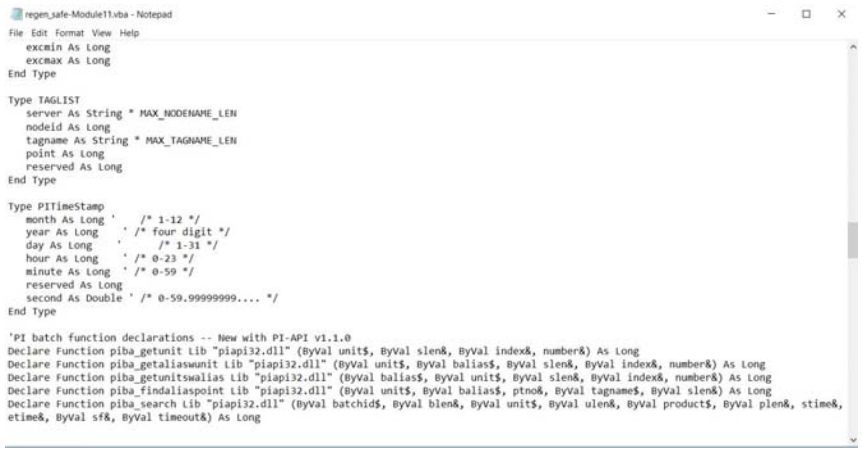
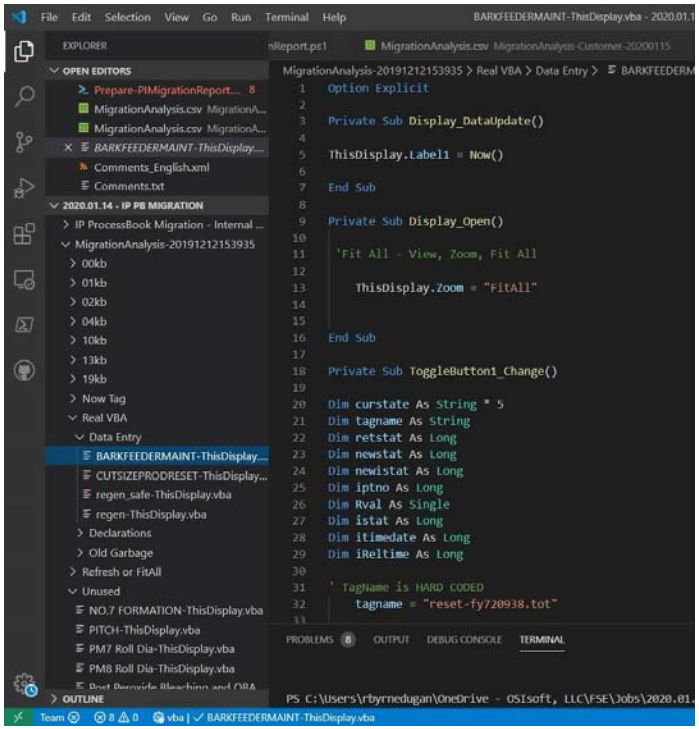
# VBA Code Analysis





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# PI Vision 2020

Ad Hoc Calculations

Multiple Time Contexts

Additional PI ProcessBook Migration

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# Contact Us

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# Questions?

Please wait for
the **microphone**

State your
**name & company**

## Save the Date...

AMSTERDAM
October 26-29, 2020

OSIsoft. PI World


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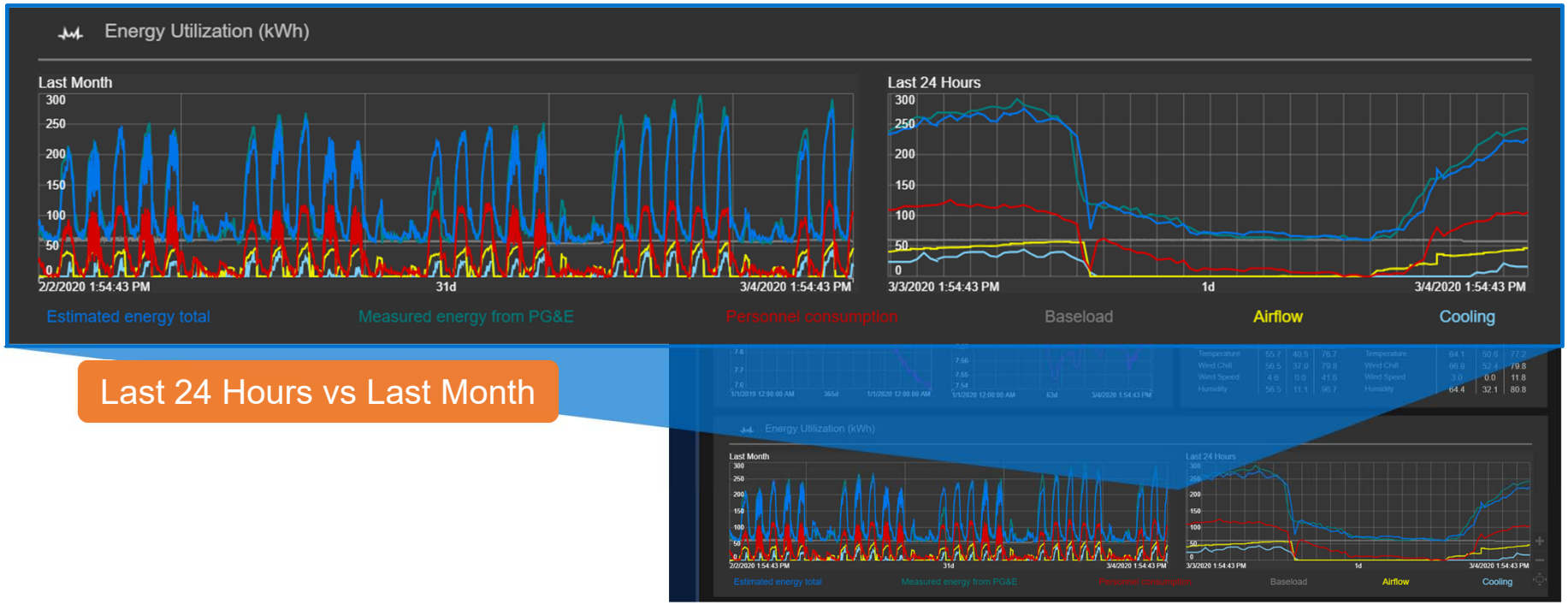
# Multiple Time Contexts

*Compare data over different time ranges*




Last 24 Hours vs Last Month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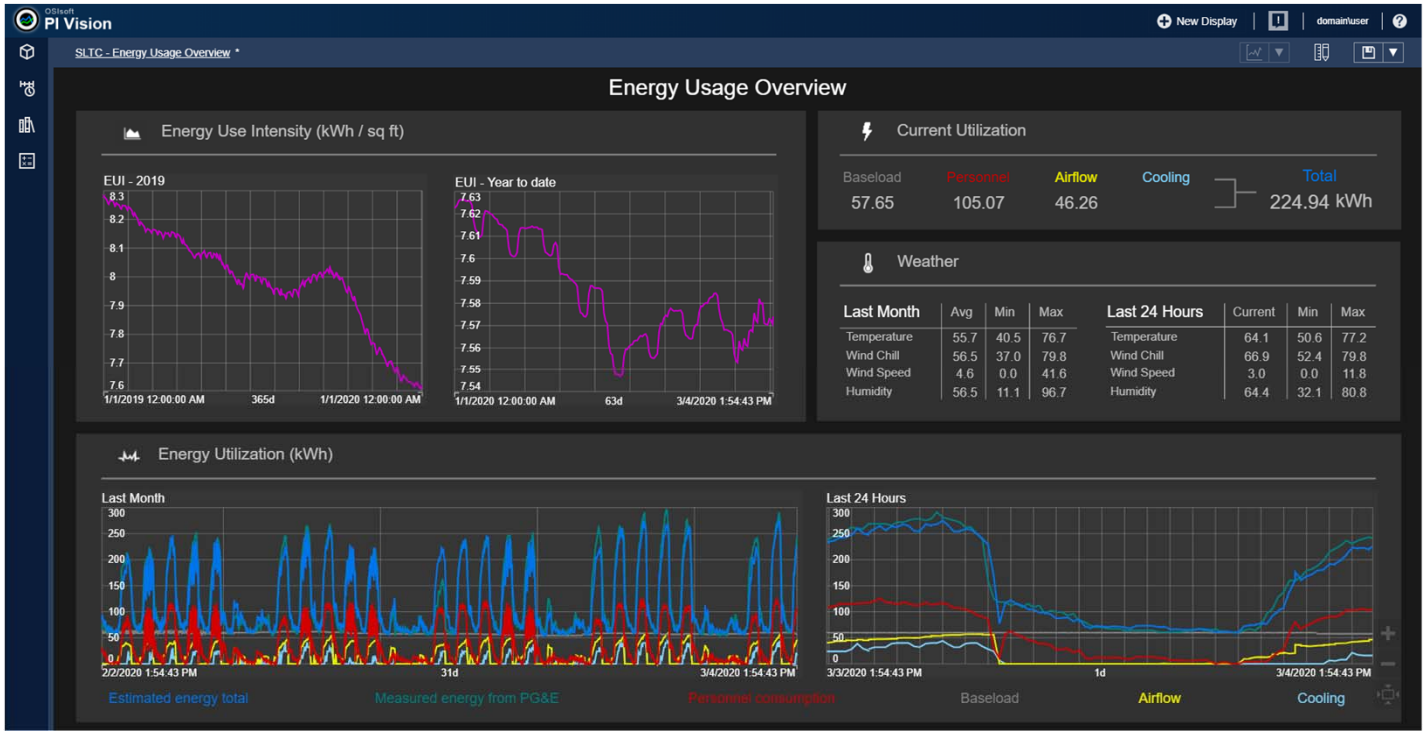
# Ad Hoc Calculations

*Quickly create calculations to analyze data on the fly*





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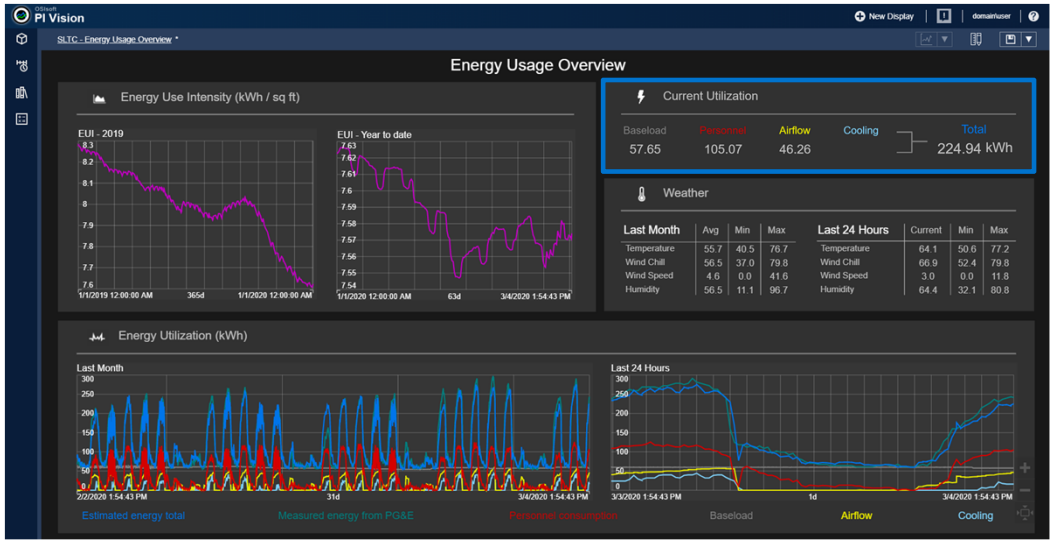
# Ad Hoc Calculations

*Quickly create calculations to analyze data on the fly*





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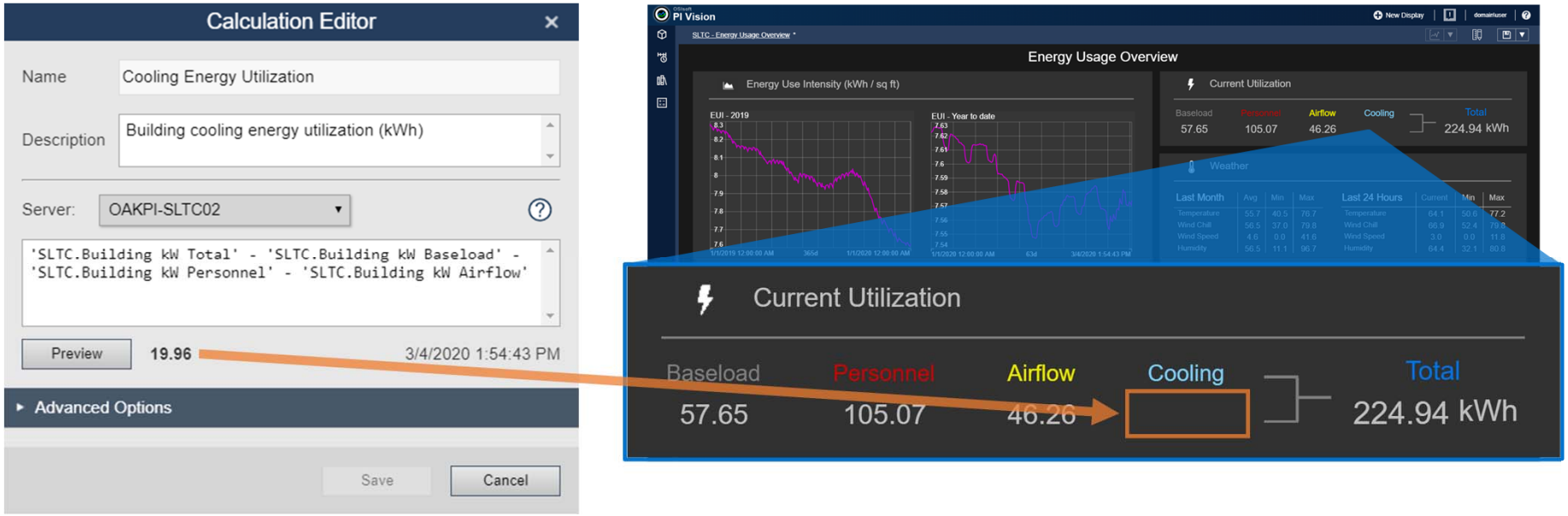
# Ad Hoc Calculations

*Quickly create calculations to analyze data on the fly*



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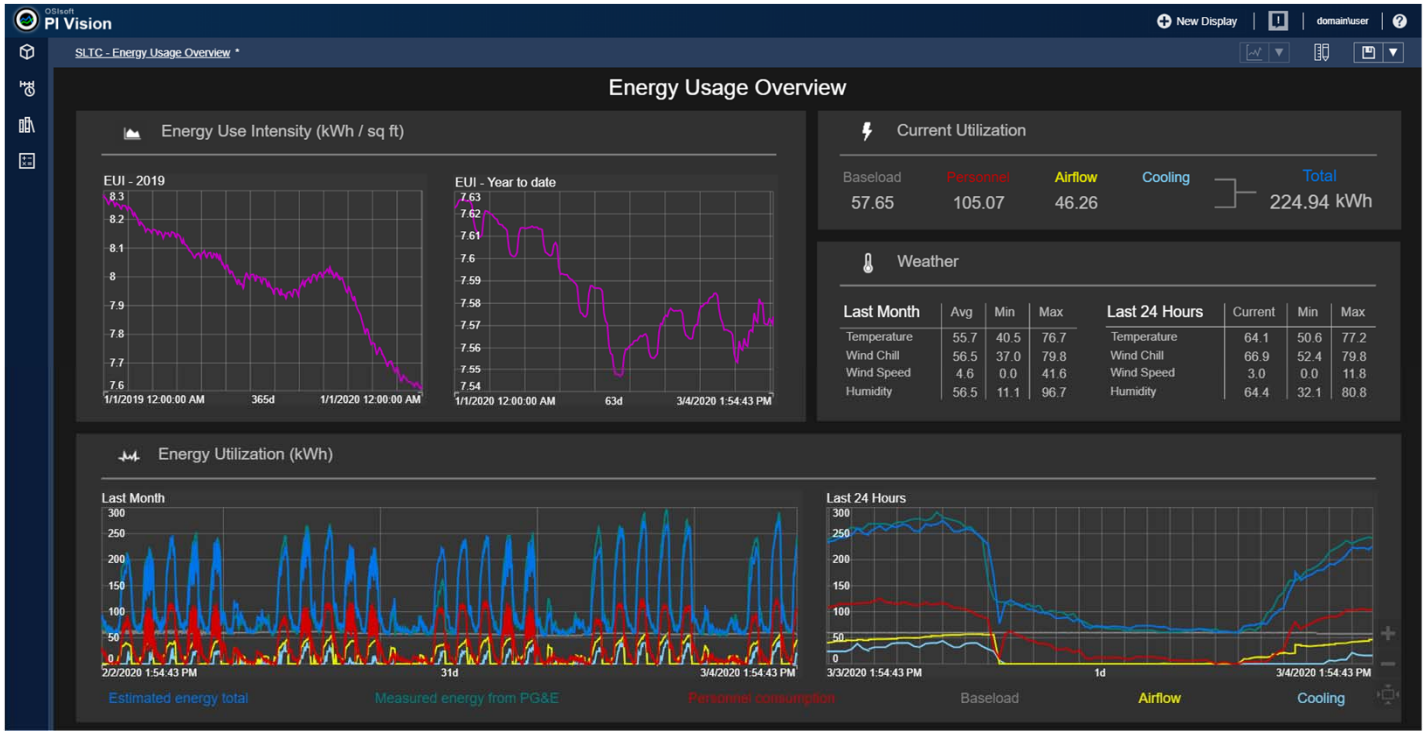
# Multiple Time Contexts

*Compare data over different time ranges*





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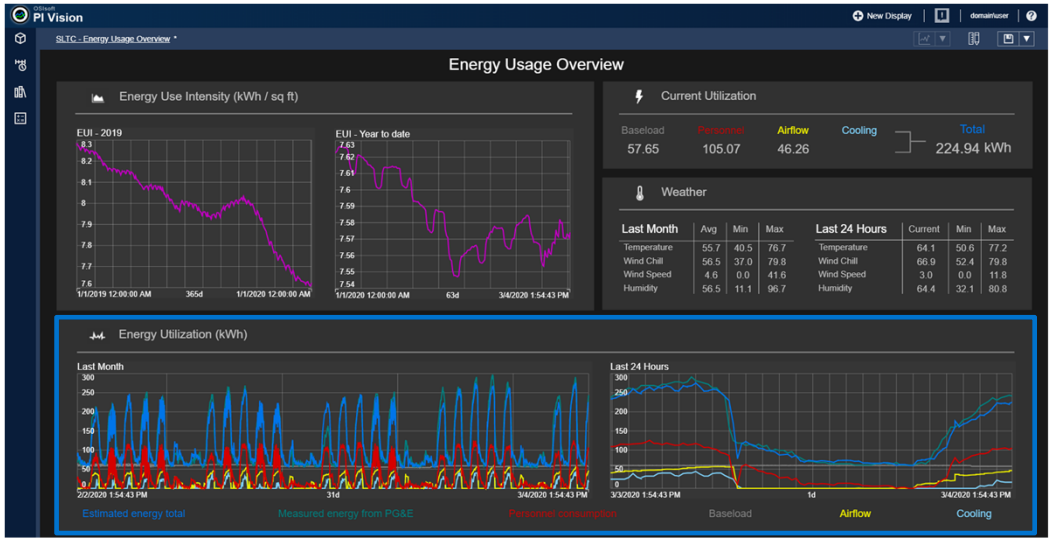
# Multiple Time Contexts

*Compare data over different time ranges*





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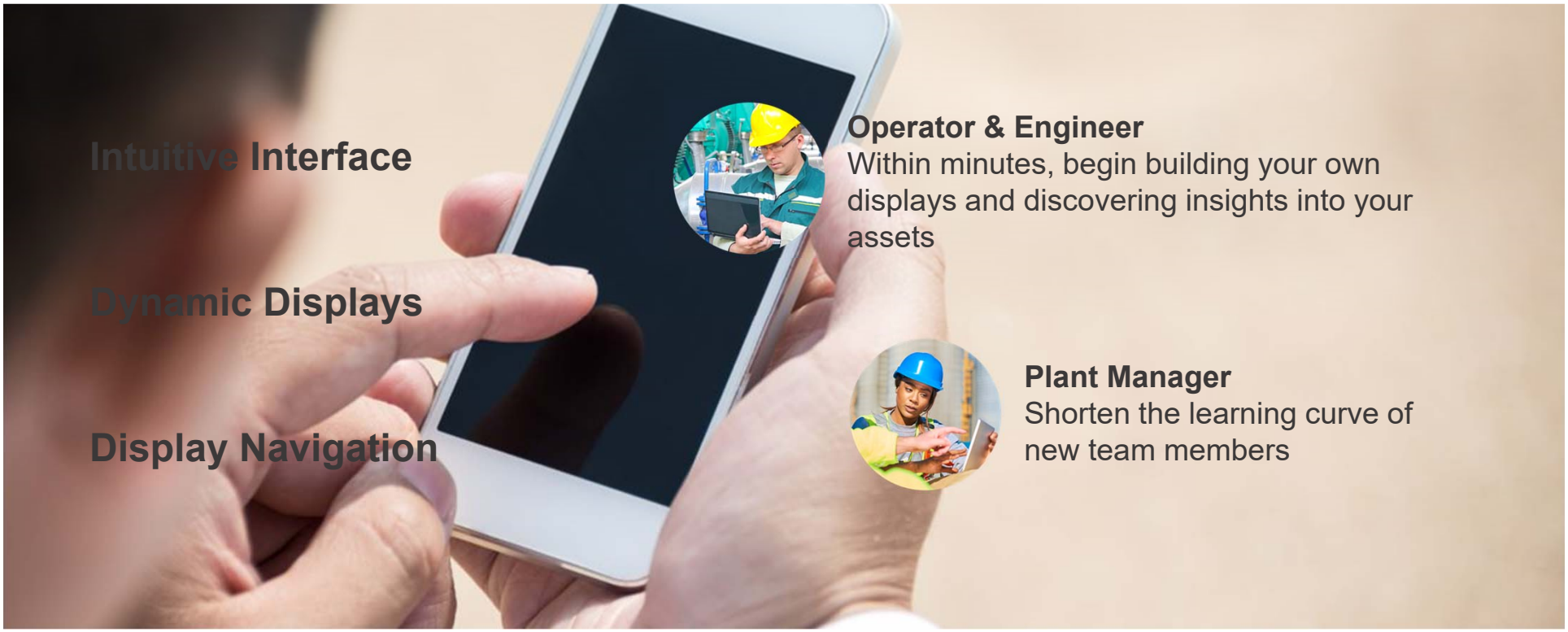
# Easy to Use



**Intuitive Interface**

**Dynamic Displays**

**Display Navigation**



**Operator & Engineer**
Within minutes, begin building your own displays and discovering insights into your assets



**Plant Manager**
Shorten the learning curve of new team members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# Self Service

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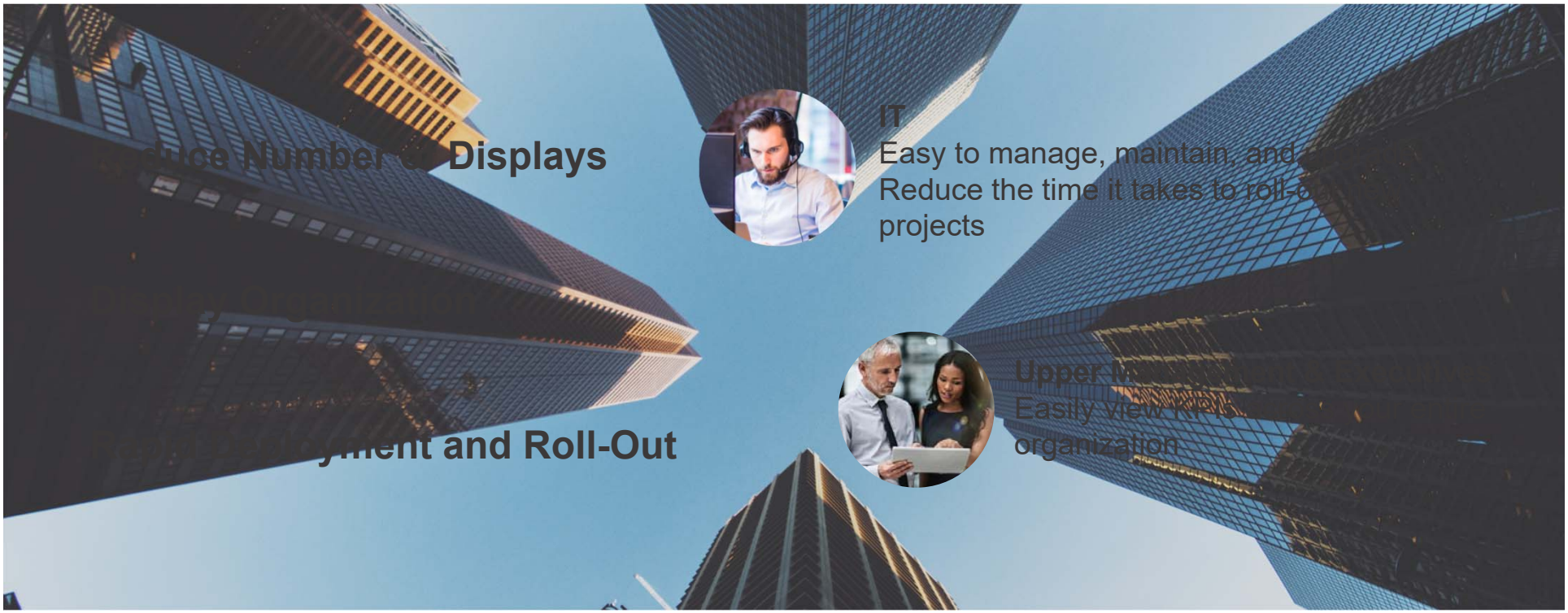
# Scalable





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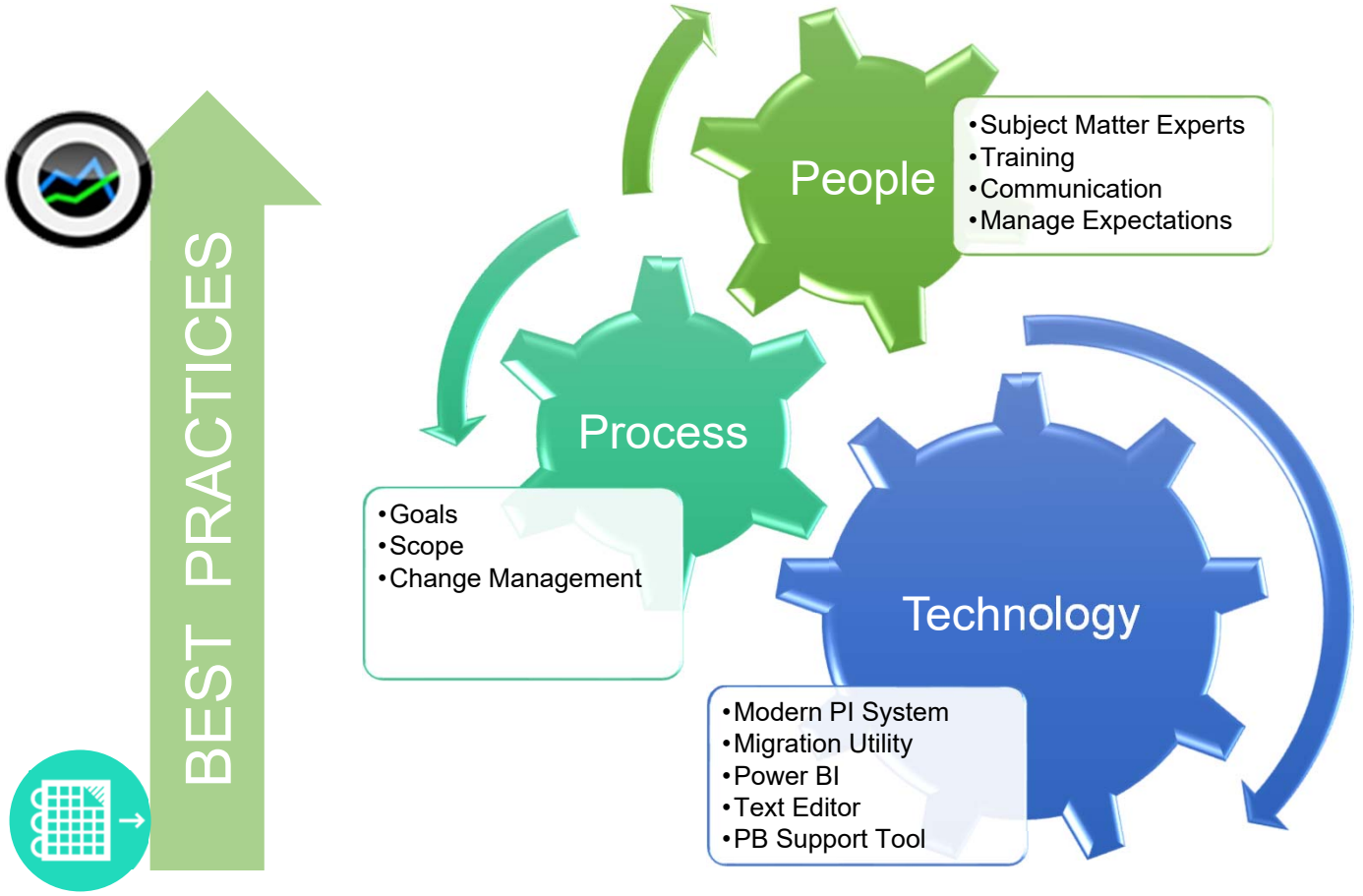



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AD1
AD2

# Define Your Journey

- What is your Future State?
  - Remove PI ProcessBook?
  - Hybrid Environment: PI ProcessBook and PI Vision?
- Like for Like?
  - One PI Vision display for each PI ProcessBook display?
  - Consolidated displays?


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**Slide 36**

**AD1** More of a transition/intermediary state.  Future state should be full Vision
Amit Dutta, 2/27/2020

**AD2** PB Viewer as a first step - could also be a intermediary state
Amit Dutta, 2/27/2020

# Define Your Journey

**All PI ProcessBook Usage**

**Hybrid Environment**

- PB Viewer
- Mixed PB/Vision usage

**All PI Vision Usage**

- All displays migrated
- All users migrated


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# Define Scope

- 1 site v many sites
- Number of PI ProcessBook displays
  - Quantity v complexity
- Hint: Retire PI ProcessBook displays that are no longer used


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AD10
AD11

# Identify Subject Matter Experts

- Engineers
- Operators
- Scientists
- Lab Technicians
- Others

- VBA
- PI Calculation Datasets
- ODBC Datasets
- SQC Charts
- Batch


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## Slide 39

**AD10** new visual to represent the message.
Amit Dutta, 3/2/2020

**AD11** Amit Dutta, 3/2/2020

AD5

# Engage Your Organization

- Communication
  - Plan
  - Expectations
  - Technical
    - Example: Buttons don't look like buttons in Vision
- Training
- Expectation Management


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**Slide 40**

**AD5** New Patch (expected March-April) will address button issue.  Let's find a different example

Amit Dutta, 2/27/2020

AD7
AD8

# Leverage These Tools

- Dev/Test Environment
  - PI Vision 2019
- PI ProcessBook to PI Vision Migration Utility
  - Create Analysis Report & Migrate Displays
- Power BI (or similar)
  - Analyze the migration analysis report
- VS Code (or similar)
  - Review the VBA content
- PI ProcessBook Support Tool
  - Upgrade PI ProcessBook file versions to minimum 3.0.15.7


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## Slide 41

**AD7** show screenshot of report and then transformed in PowerBI for actionable insights
Amit Dutta, 2/27/2020

**AD8** same for VS Code.
Amit Dutta, 2/27/2020

# Define Change Management

- Applies to:
  - Displays
  - AF Hierarchy
  - AF Analyses
- Establish process to update a published display
- Identify who has access to edit
- Define frequency/cadence of changes


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# Go Beyond ‘Like for Like’

- Opportunities to Leverage the Modern PI System
  - PI AF Analyses
  - Event Frames Visualizations
  - Collections
  - Asset Swapping
  - …and more


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AD9

# Prep Your PI ProcessBook Displays

- Use a template for sizing, font and colors
- Text symbol Multi-State
- Button fonts
- Value symbol (value/timestamp/engunits placement)
- Layers


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## Slide 44

**AD9** new title

Amit Dutta, 2/28/2020