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How to create Dashboard in Wonderware Historian InSight

SUMMARY

Historian version 11.6.14101 (or 2014R2 SP 1 P01) and above offer a feature called Historian InSight. InSight is the on-premises version of Wonderware Online InSight. It provides an easy-to-use graphical interface for analyzing data, creating charts, and compiling dashboards of related information. A Historian InSight Dashboard provides you with a view of related information by displaying related charts, together in one place. This *Tech Note* provides the step-by-step procedure how to create a dashboard within the Historian InSight.

Application Versions

- Historian version is 17,0,18000,000 (or 2017)
- Historian tags were imported from the InTouch Demo application.
- Data values for Historian tags are from an InTouch Demo application

ACTION

1. Start Configurator and highlight Search.
2. Make sure the **Reindex Search Documents** option is selected, then click the **Configure** button at the bottom right side of the dialog box.
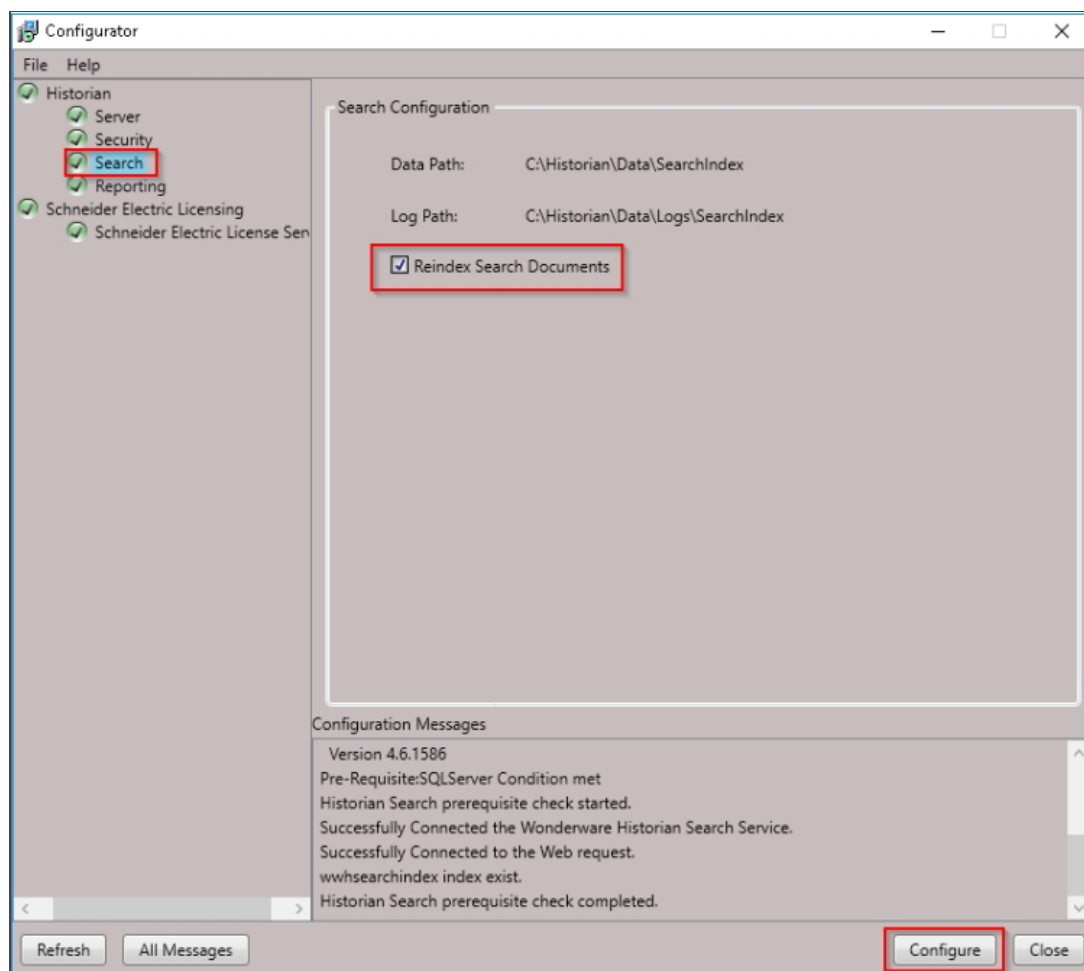

Figure 1: Configurator settings

3. From the Historian SMC, highlight **Status** and make sure Historian System status is **Running**.

Note:
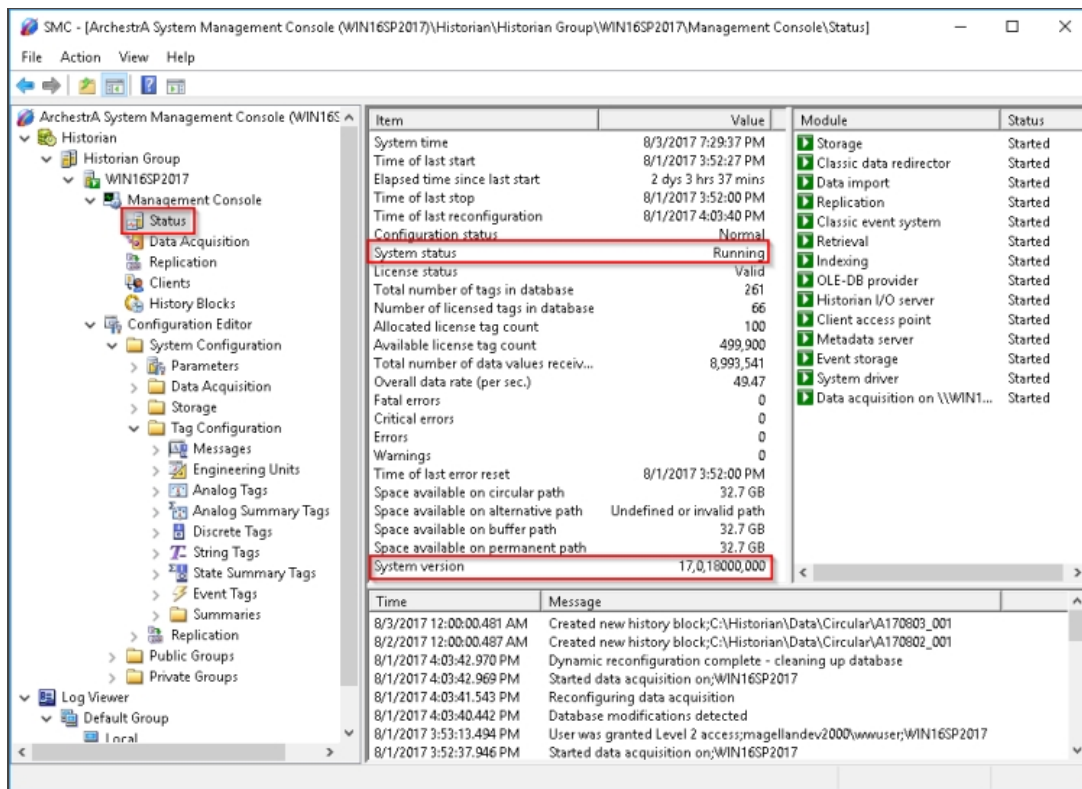Historian System version is at 17,0,18000,000

Figure 2: Confirm Historian version

4. On the Historian Server machine, open either Microsoft Internet Explorer (IE) or Chrome web browser, and type the following URL:

http://<Server name>:32569

Where Server name is the name of the Historian server.

Tip: Because the Historian is on the local machine, you can replace the server name with **Localhost**:

http://Localhost:32569

Notes:
• Chrome is a preferable web browser choice for Historian InSight
• Make sure the firewall port **32569** is open.
• You can check it out using Telnet Client in the following command line:

```
TELNET <Servername>  32569
```

5. First, create some **Content** for the dashboard. With Historian InSight, you can search for specific tags and display them in a single chart view.

You can choose the chart type, add or remove tags from the chart, fine-tune how the content is displayed. You can then save and share your content.
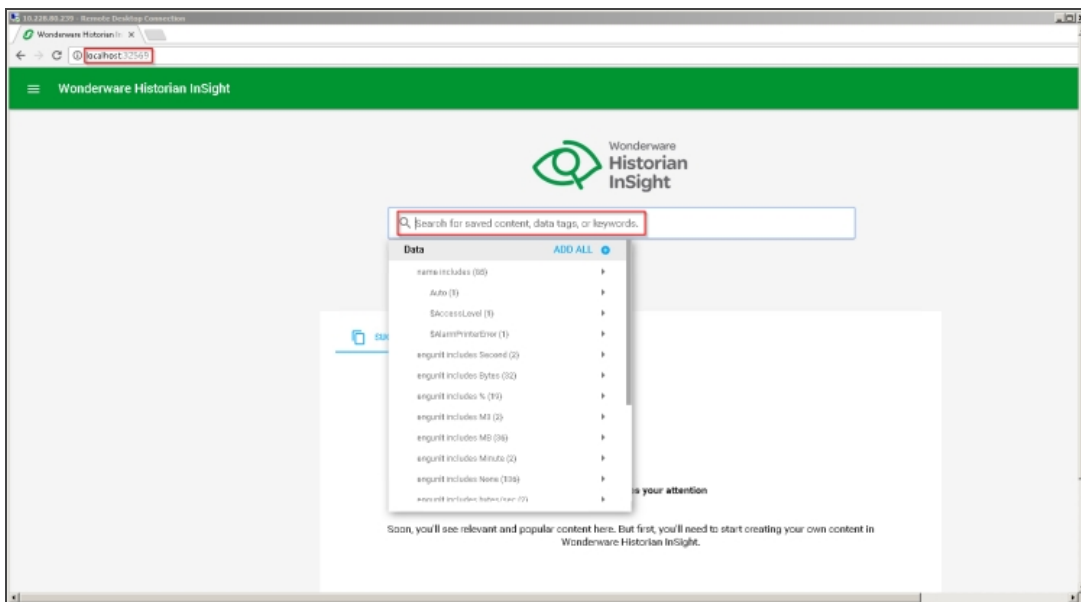
Figure 3: Creating InSight dashboard content

The search bar allows you to search for any set of tags based on string characteristics of the tags, such as tag name, description, and engineering unit.

In this example, suppose you want data related to a reactor, you could type **Reactor** in the search bar to see saved content and data related to this search criterion.

Figure 4 (below) shows it found 2 tags: **ReactLevel**, and **ReactTemp** because their tag descriptions contain the word **reactor**.

6. Select the tags you want to add to include them in the operational data you want to view.

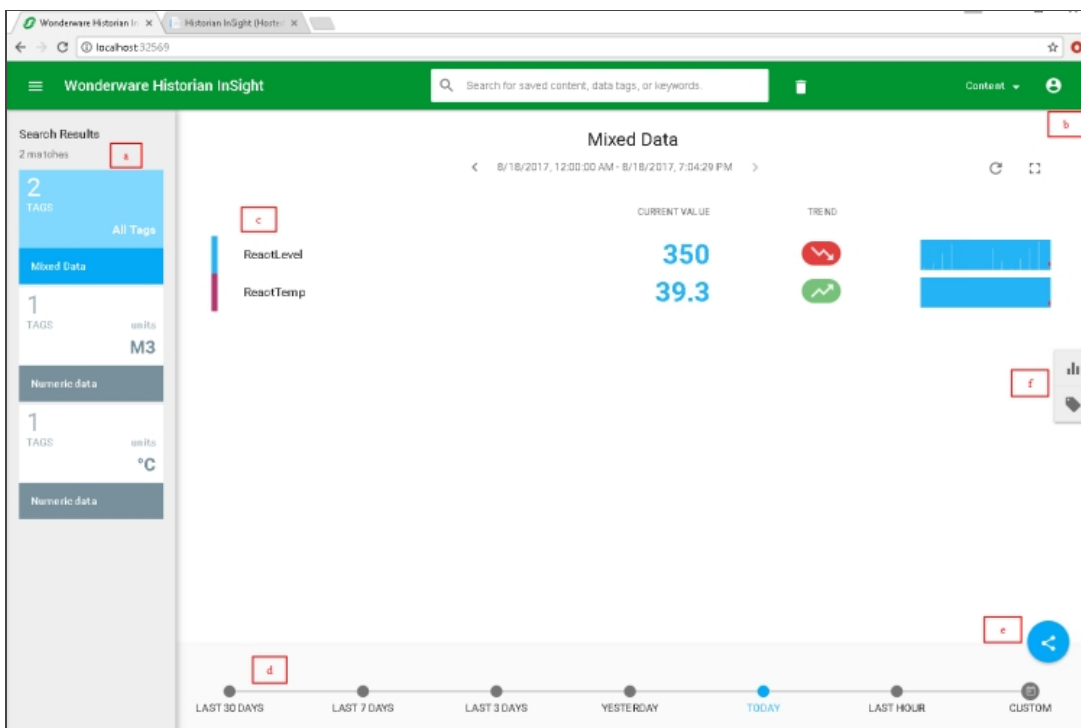   The following figure shows tags **ReactLevel** and **ReactTemp**.

Figure 4: Reactor tags for InSight

Here are some descriptions for the this display:

- **a: Search Results** are categorized by tag types and engineering units. We can choose a category to work with. A special category called **All Tags** that combines numeric tags with different units of measure.
  Note: Engineering units (or unit of measure) are case-sensitive. That means ml (milliliters) and ML (mega liters) are not the same.

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- **b: Logged in user**. If you mouse over the person icon on the upper left corner of the screen, it will show you the current login user name.
- **c:** Tag names that related to the keyword entered in the search box
- **d: Timeframe** for the data
- **e: Share menu** to save or reuse your data analysis
- **f: Show Gallery** and **Show Data** buttons

7. Click the **Show Gallery** then select **Line Chart**
8. On the **Timeframe** at the bottom of the chart, select the timeframe you want to display for the chart. The following figure shows **LAST HOUR** was selected.

   By clicking on a tag name you can turn on or off the tag from the chart.

9. After you satisfy with the chart, click on the **Share menu** and select **Save** to save the trend.
10. Type a meaningful **Content Name** to describe the chart.

    In this example, the content name is **Reactor – Hourly Temp and Level**.

11. Type a descriptive **Keyword** or set of keywords for the content you want to include in the dashboard. Make sure one or more keywords define just the content you want to include in the dashboard. If you are too general, you can end up with extra content you did not want in the dashboard.

    In this example, the keywords **Hourly** and **Reactor** are being used for our first content (Figure 5 below).

    Note: Keywords are important because they allow you to add multiple contents having one or more common keywords into a single dashboard so that you can view multiple things at the same time.

Figure 5: Add keywords

12. Click **SAVE**. Figure 6 below shows the content **Reactor – Hourly Temp and Level**.
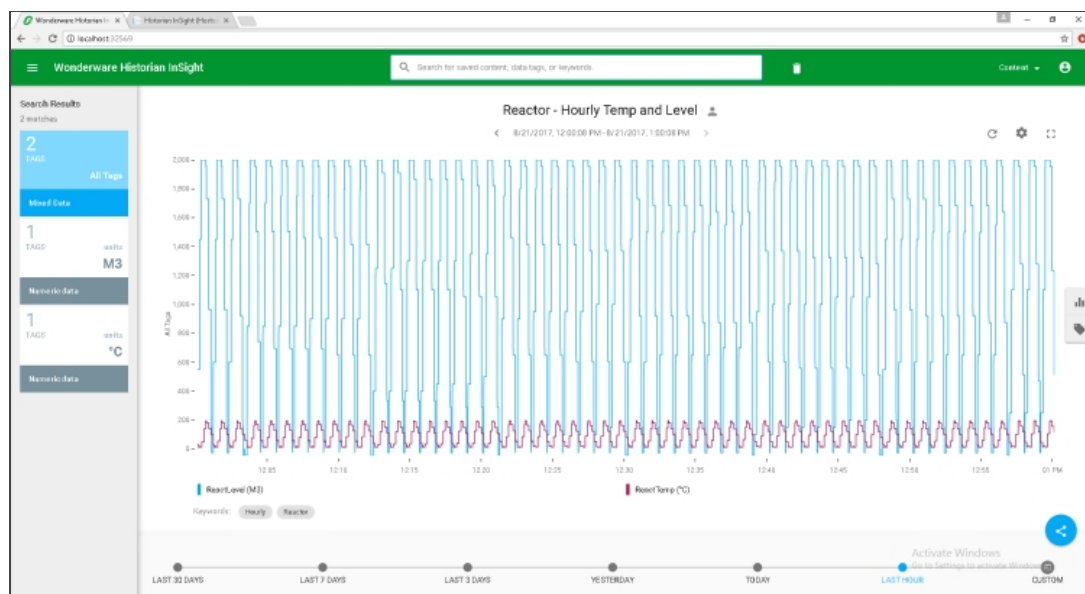

Figure 6: Completed InSight dashboard

13. Repeat the previous steps and select XY Plot to display TODAY's detail data for the tags: **ReactLevel** and **ReactTemp** in this example.

Content name: **Reactor – XY Plot**
Keywords: **Reactor**, **Temp**, **Level**, **Hourly**

Figure 7: Keywords

14. Figure 7 (below) shows the content and **Reactor – XY Plot**:

Figure 8: Completed dashboard

Note that the keyword **Reactor** is common for both contents **Reactor – Hourly Temp and Level** and **Reactor – XY Plot**.

15. Click the **Menu** icon then on **Manage Content** to show the contents you just created. In order to rename, copy, or remove content, click the vertical ellipsis on the far right of each of the contents.
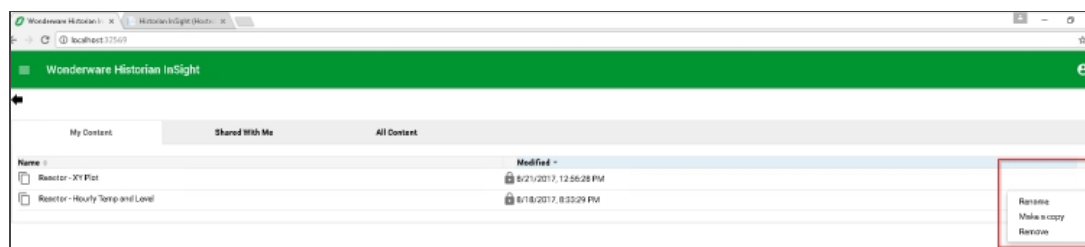

Figure 9: Rename, copy or remove content

Now you can combine your contents into a single view or dashboard.

16. Click on the **Menu** icon – **Home**, then enter the keyword (or keywords) in the search bar you want to associate with this dashboard. In this case, type **reactor**.
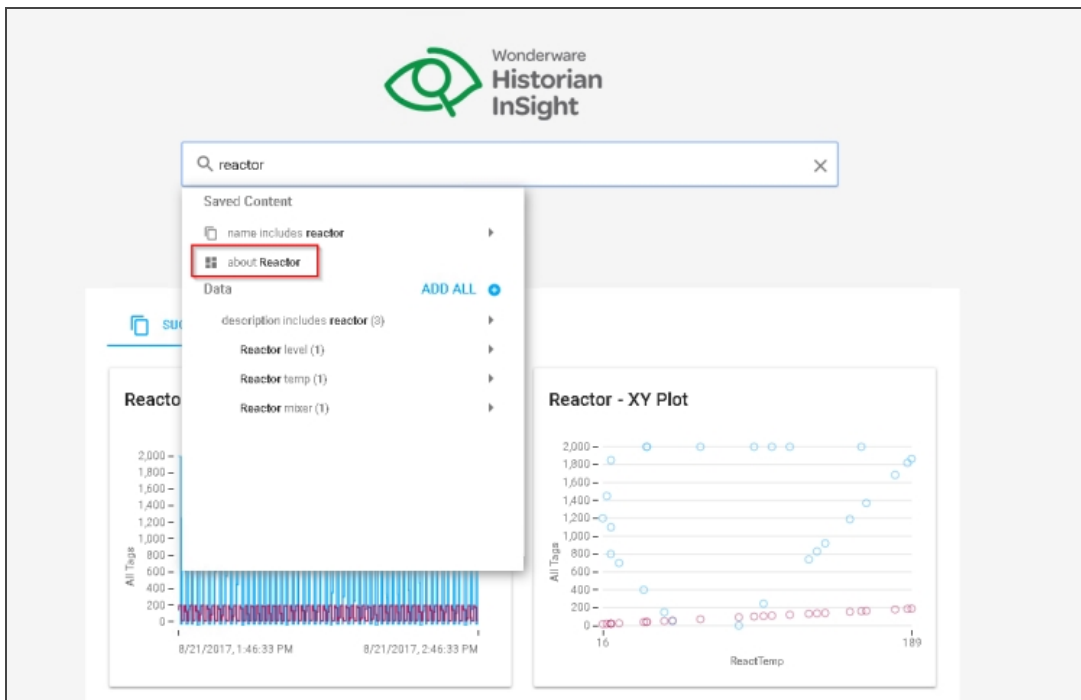
Figure 10: Search keywords

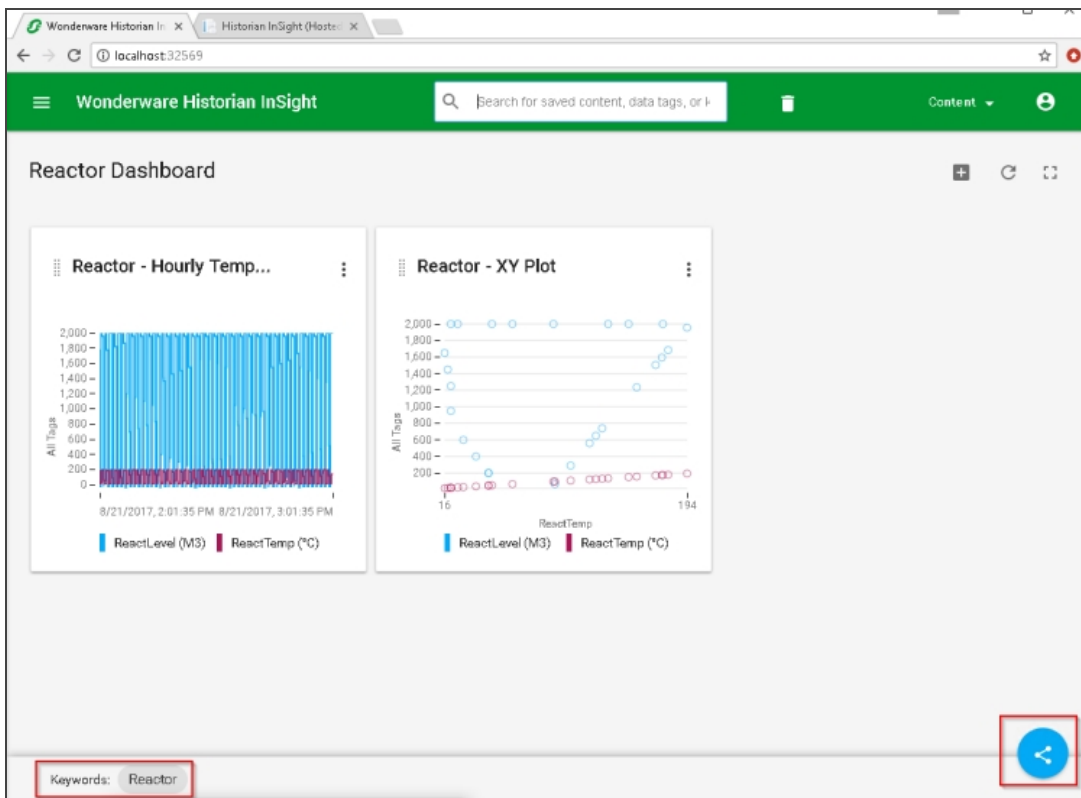You see all contents that are associated with the keyword **Reactor**.

Figure 11: Reactor dashboard

17. Click the **Share menu** and click **Save**.

Figure 12: Save dashboard

ATTACHMENTS

http://okmgcs.km.invensys.com/resources/sites/KPKA/content/live/TN/2000/TN2885/en_US/~secure/{ "SECUREDRESOURCE": "Y" }

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