OEE Studio Tool Tip

Schedule & Email Reports (v4.x)

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Schedule & Email Reports

- The Schedule Reports module provides the ability to setup **Reports** in the **Reports tab** to be scheduled and emailed. ___Only the reports in the Reports tab can be scheduled.___

- There is an extra application that must be installed on the server. This application is the **OEE Studio Scheduler**. It runs as a background service monitoring pending scheduled reports. This must be installed and configured in order to email the reports. (please contact us so that we can work with your IT team to get this installed on the server.)

- The **Default Email Settings** can be found within **OEE Studio – Settings – Default Settings** – Default Email Settings.

Schedule Reports

- It is **very** important to understand when your shifts start and end to ensure that the report can be created.

- The **Schedule Reports** option provides the ability to schedule a report to be emailed at a preset 'scheduled' time.

- This requires the **OEE Studio Scheduler Service** to be installed on the same server as the XL Bolt-On Data Collector.

- (Please contact us to work with your IT team to get it installed.)

Set the Schedule Defaults in **OEE Studio**

Configure Default Email Settings.
The text in the Title and Message can be modified. This is the default text. If you change the text, you can always click on the Revert to default to put it back to factory settings.

Enter the default Recipients. It is a good idea to enter all possible recipients and then when you schedule the report, you can modify the list. You can also use Active Directory groups.

Click on the **Settings** tab **bottom left corner** of OEE Studio. Select **Defaults – General Defaults**.

Enter all possible **Recipients** for any of the reports. You can also enter Active Directory groups.

When you schedule a specific report, you can remove recipients or add different ones.

Click **Apply Changes** to save the information.

Finding Valid Shift Start and End Times

It is **<u>VERY</u>** important that you understand what your shift Start and End times are as they could be off by a couple of seconds. (This is an issue with your Vorne XL device.)

You can find them by navigating to **Shift Data – Shift Analysis.**

Select the **Show/Hide Fields** option and scroll all the way to the end of the list to find '**Shift Interval**'

Drag **Shift Interval** to the Row Area.

Step 1 – Setting up the Report Parameters

1. Select a **Report** (in the Reports tab) you want scheduled.

2. Depending upon which **Shift** - **Select the current date and the start TIME for the shift and the end TIME for the shift** (following the shift interval times from the shift analysis screen).

3. Select the **Shift**.

4. Select what to show in the **Top Losses**.

5. Select a specific Line or leave blank for all Lines.

6. Click the **Add to Favorites** Button. <u>**Do not click Print/Preview the report.**</u>

If your shift end time is a couple of seconds after the hour, then you need to add a minute to the End Time of the date range.

Step 2 – Setting up the Favorite

1. It might be a good idea to add a little more description of the report as this is what will show up in the Subject line of the email.

2. Select the **Range for 1 Day(s)** if you want this report send each day.

3. Make sure the Status is **Active**.

4. Click the **Set Scheduling** Button.

Select the Schedule Options.
1. **Frequency** – Day, Week, etc.
2. **Run at** – make it at least 2 minutes after the shift end time.
3. Update any **Recipients**
4. Click **OK** button

- **Important Note** – Most often the XL Bolt-On Data Collector is configured to look for new data from each Vorne XL unit every 1 minute.

- If you don't see your report, it may be that the Data Collector is configured at a higher rate than 1 minute.

- **Set the schedule time to be at least 2 minutes after the shift ends to give the Data Collector time to harvest the data.**

Step 3 – Time Filters and Single Day Reporting

A - The **Date Range** for the report must align with the Shift Start and End times from your Vorne XL devices. (see page 5 above)

B – The **Time Filters** in the Schedule Options provides the scheduler with the Start and End times of the data for the report.
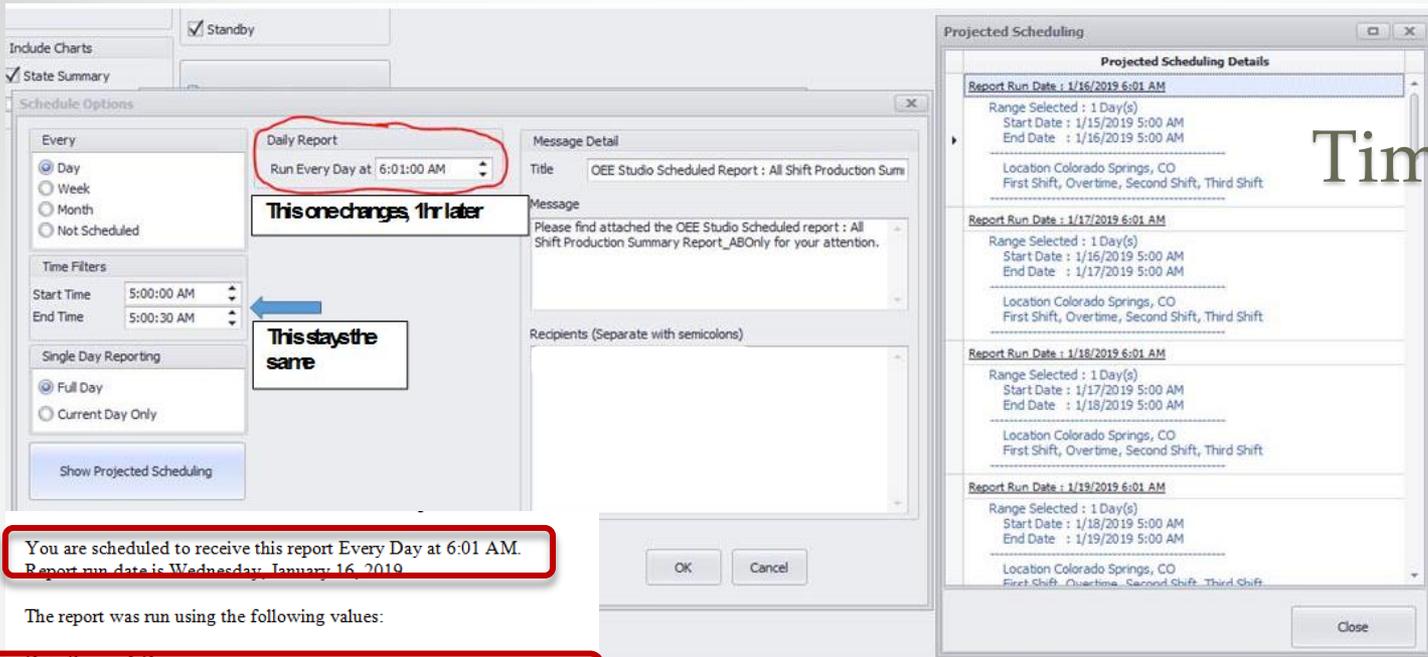
C – Single Day Reporting – If you want the **Line OEE** report for a full production day, then you would select **Full Day**. If you are creating a report for a specific **shift**, then you select **Current Day Only**.

Third Shift

- If your Third Shift starts the evening before, then you need to be very explicit with the Date Range selection.

- When setting up the report the first time, the **From** date should be today and the time is the start time of the Third Shift.

- The **To** date should be set to tomorrow and the time is the end time of the Third Shift.

- Follow the rest of the steps above making sure that the scheduled time is at least 2 minutes after the shift has ended.

Time Zones

- If your server is in one time zone and your plant is in a different time zone, you need to **Schedule** the report to *run in the time zone of the server*.

- For this example, the server is in the Central U.S. Time Zone. The plant is in the Mountain Time Zone – one hour behind the server.

- You would set the **REPORT** time values for the shift start and end times (i.e. 5:00AM – 5:00PM) of the MTN time zone and the report to **RUN** at the CST time zone. (i.e. 6:01AM)

Email Example

Cc:
Subject: OEE Studio Scheduled Report : Shift Comment Report - 3rd Shift L22

✉ Message 📄 Shift Comment Report.pdf (146 KB)

<---- This is an automatically generated email. Please do not respond. ---->

Please find attached the OEE Studio Scheduled report : Shift Comment Report - 3rd Shift L22 for your attention.

You are scheduled to receive this report Every Day at 6:22 AM.
Report run date is Monday, June 18, 2018.
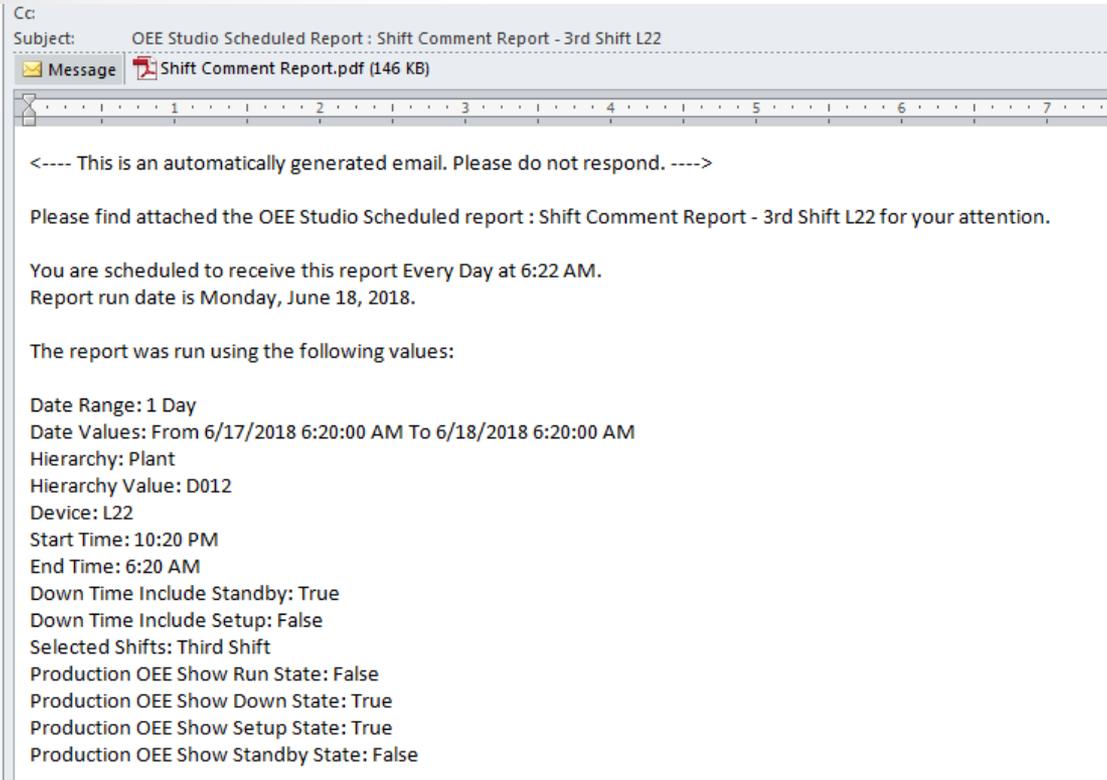
The report was run using the following values:

Date Range: 1 Day
Date Values: From 6/17/2018 6:20:00 AM To 6/18/2018 6:20:00 AM
Hierarchy: Plant
Hierarchy Value: D012
Device: L22
Start Time: 10:20 PM
End Time: 6:20 AM
Down Time Include Standby: True
Down Time Include Setup: False
Selected Shifts: Third Shift
Production OEE Show Run State: False
Production OEE Show Down State: True
Production OEE Show Setup State: True
Production OEE Show Standby State: False

The contents of the email indicate the selection settings for the specific report. This is helpful in troubleshooting.

Example of a scheduled report in the Favorites screen.

Contact Us

- As the Vorne Authorized Reporting Consultants, we provide customized reporting solutions, including working with data from your ERP/MRP systems.

- In addition to customized reporting, we provide support and customization for the **OEE Studio** reporting software (designed specifically for the data captured from the Vorne XL devices).

- We also provide sales, support and customization for **OEE Alert**. (www.OEEAlert.com)

OEE Studio, OEE Alert and XL Bolt-On Data Collector are part of the Marketing brand of

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