

OEE Studio Tool Tip

Schedule & Email Reports (v4.x)

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Updated January 16, 2019

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

The screenshot shows the 'System Defaults' window in OEE Studio. The left sidebar has 'Defaults' selected, with 'General Defaults' highlighted. The 'Default Email Settings' section is expanded and highlighted with a red box. The 'Settings' tab is also highlighted at the bottom left. The main content area includes sections for 'Default Start Time', 'Downtime calculation', 'Job User Fields', and 'Shift User Fields'. The 'Default Email Settings' section contains fields for 'Title', 'Message', and 'Recipients', each with a 'Revert to default' button. An 'Apply Changes' button is located at the top left of the email settings section.

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

The screenshot displays the SAP Shift Analysis interface. On the left, the 'Shift Data' menu is highlighted with a red box. Below it, the 'Shift Interval' option is also highlighted with a red box. The main table shows shift data with columns for Shift, Start Time, and End Time. A red oval highlights the 'End Time' column. On the right, the 'PivotGrid Field List' dialog is open, showing a list of fields to be dragged into the PivotGrid. The 'Shift Interval' field is highlighted with a red oval in the 'Data Area' section.

Shift	Start Time	End Time
First Shift	5/3/2016 6:00:00 AM	5/3/2016 4:30:01 PM
First Shift	5/4/2016 6:00:00 AM	5/4/2016 4:30:01 PM
First Shift	5/5/2016 6:00:00 AM	5/5/2016 4:30:01 PM
First Shift	5/6/2016 6:00:00 AM	5/6/2016 4:30:01 PM
First Shift	5/9/2016 6:00:00 AM	5/9/2016 4:30:01 PM
First Shift	5/10/2016 6:00:00 AM	5/10/2016 4:30:01 PM
First Shift	5/11/2016 6:00:00 AM	5/11/2016 4:30:01 PM
First Shift	5/12/2016 6:00:00 AM	5/12/2016 4:30:01 PM
First Shift	5/13/2016 6:00:00 AM	5/13/2016 4:30:01 PM
First Shift	5/16/2016 6:00:00 AM	5/16/2016 4:30:01 PM
First Shift WE Total	5/7/2016 6:00:00 AM	5/7/2016 2:30:01 PM
First Shift WE Total	5/14/2016 6:00:00 AM	5/14/2016 2:30:00 PM
Gap Shift	5/4/2016 4:30:00 AM	5/4/2016 6:00:00 AM
Gap Shift	5/7/2016 2:30:00 AM	5/8/2016 2:30:03 PM
Gap Shift Total	5/3/2016 4:30:00 AM	5/4/2016 4:30:01 AM
Gap Shift Total	5/4/2016 4:30:00 AM	5/5/2016 4:30:01 AM
Gap Shift Total	5/5/2016 4:30:00 AM	5/6/2016 4:30:01 AM
Gap Shift Total	5/6/2016 4:30:00 AM	5/7/2016 4:30:01 AM
Gap Shift Total	5/9/2016 4:30:00 AM	5/10/2016 4:30:01 AM
Gap Shift Total	5/10/2016 4:30:00 AM	5/11/2016 4:30:01 AM
Gap Shift Total	5/11/2016 4:30:00 AM	5/12/2016 4:30:01 AM
Gap Shift Total	5/12/2016 4:30:00 AM	5/13/2016 4:30:01 AM
Gap Shift Total	5/13/2016 4:30:00 AM	5/14/2016 4:30:01 AM

It is **VERY** 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

The screenshot shows the 'Shift Comment Reporting' interface. On the left, a 'Shift Reports' sidebar contains a tree view with 'Shift OEE With Comments' selected (callout 1). The main area is titled 'Shift Comment Reporting' and includes a 'Hierarchy' section with 'Plant' set to 'D012'. Below this is a 'Date Range' section with 'From' set to '6/17/2018 2:20 PM' and 'To' set to '6/17/2018 10:20 PM' (callout 2). An 'Available Items' section has 'Second Shift' selected (callout 3). A 'Show in Top Losses' checkbox is checked (callout 4). At the bottom, a 'Devices' dropdown is set to 'L21' (callout 5). A 'Print / Preview' button is visible at the bottom right.

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. **Do not click Print/Preview the report.**

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

The screenshot shows the 'Add to Favorites' dialog box with the following configuration:

- Identification:** Title is 'Shift Comment Report - 2nd Shift L22' (circled 1). Description includes 'D012 L22' and 'Created by vorneadmin 6/17/2018 2nd Shift selected'. Group Name is 'Second Shift'.
- Date Range:** Range is '1' (circled 2) with 'Day(s)' selected. Available To is 'All Users'. Status is 'Active' (circled 3).
- Buttons:** 'Set Scheduling' button is circled 4. A message box at the bottom states 'No Scheduling is Currently Defined'.

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.

Step 3 – Set the Schedule

Hierarchy

Plant

Date Range

From 6/17/2018 2:20 PM

To 6/17/2018 10:20 PM

Preset Dates Choose Preset

Prev/Next <<...>>

Available Items

First Shift

Manual Reset

Second Shift

Shift Undefined

Third Shift

Show in Top Losses

Running

Down

Setup

Standby

Devices

L22 All

Print / Preview

Schedule Options

Every

Day

Week

Month

Not Scheduled

Daily Report

Run Every Day at 10:22:00 PM

Message Detail

Title OEE Studio Scheduled Report : Shift Comment Report -

Message

Please find attached the OEE Studio Scheduled report : Shift Comment Report - 2nd Shift L22 for your attention.

Recipients (Separate with semicolons)

debbie.olk@debtechsystems.com

Status Active

Set Scheduling

Every Day at 10:22 PM.

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

The screenshot displays a software interface for configuring a report. At the top, there are several sections: 'Hierarchy' with a 'Location' dropdown set to 'Blaine, WA'; 'Downtime calculation' with checkboxes for 'Include Standby in Downtime' (unchecked) and 'Include Setup in Downtime' (checked); 'Date Range' with 'From' and 'To' date and time pickers (9/10/2018 7:00 AM and 9/11/2018 7:16 AM); 'Available Devices' with checkboxes for 'Blaine-PB' (checked) and 'Blaine-TN' (unchecked); and 'Show in Top Losses' with checkboxes for 'Running' (unchecked), 'Down' (checked), 'Setup' (checked), and 'Standby' (unchecked). A 'Print / Preview' button is located below these sections.

The main window is titled 'Schedule Options' and contains three main panels: 'Every' with radio buttons for 'Day' (selected), 'Week', 'Month', and 'Not Scheduled'; 'Daily Report' with a 'Run Every Day at' field set to '7:17:00 AM'; and 'Message Detail' with a 'Title' field containing 'OEE Studio Scheduled Report : Line OEE Report - BLN P' and a 'Message' field containing 'Please find attached the OEE Studio Scheduled report : Line OEE Report - BLN PB for your attention.' Below the message field is a 'Recipients' field with the instruction '(Separate with semicolons)'. At the bottom of the window are 'OK' and 'Cancel' buttons.

Annotations: A circled 'A' points to the 'Date Range' section. A circled 'B' points to the 'Time Filters' section, which includes 'Start Time' (7:00:00 AM) and 'End Time' (7:16:00 AM) pickers. A circled 'C' points to the 'Single Day Reporting' section, which has radio buttons for 'Full Day' (selected) and 'Current Day Only'.

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.

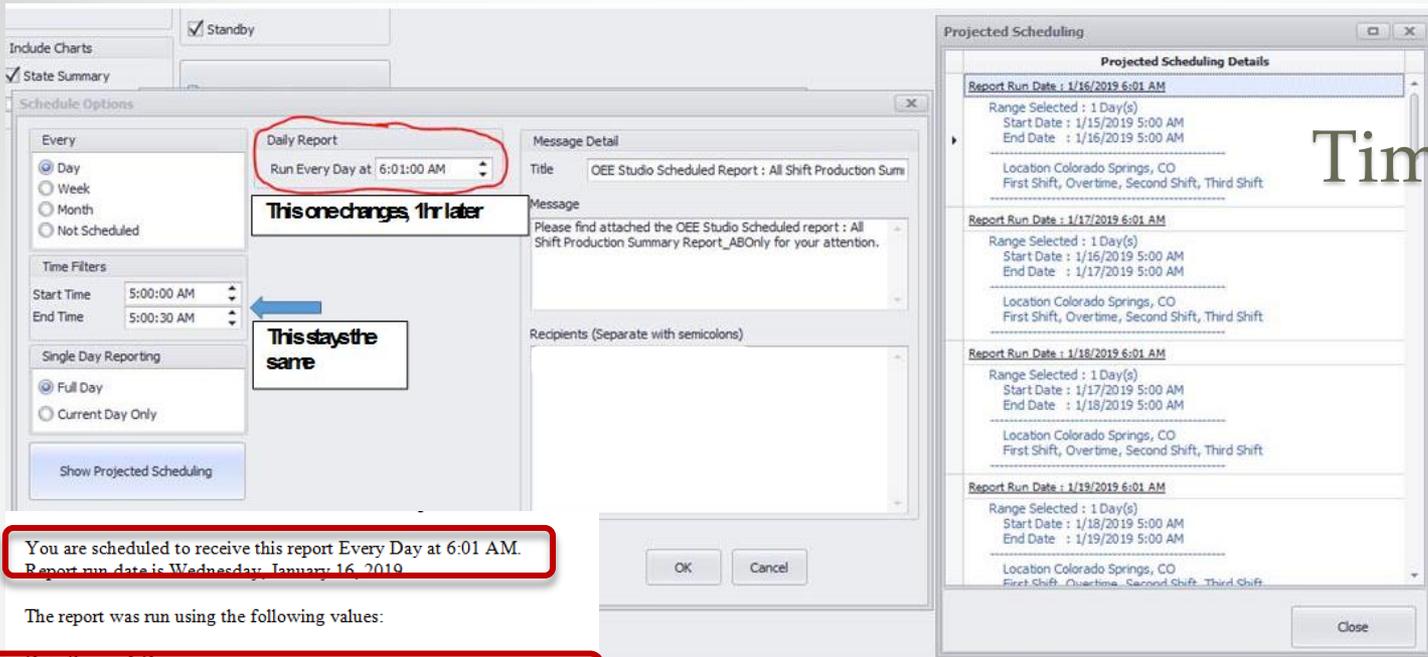
C – **Single Day Reporting** – If you want the **Line OEE** report for a full production day, then you would select **Full Day**. If you are creating a report for a specific **shift**, then you select **Current Day Only**.

Third Shift

The screenshot shows a software configuration window with several sections:

- Hierarchy:** Plant: D012
- Date Range:** From: 6/17/2018 10:20 PM, To: 6/18/2018 6:20 AM. This section is highlighted with a red box.
- Available Items:** A list of checkboxes including First Shift, Manual Reset, Second Shift, Shift Undefined, and Third Shift. The Third Shift checkbox is checked and highlighted with a red box.
- Show in Top Losses:** Running (unchecked), Down (checked), Setup (checked), Standby (unchecked).
- Devices:** L22
- Print / Preview:** A button at the bottom right.

- 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

You are scheduled to receive this report Every Day at 6:01 AM.
Report run date is Wednesday, January 16, 2019.

The report was run using the following values:

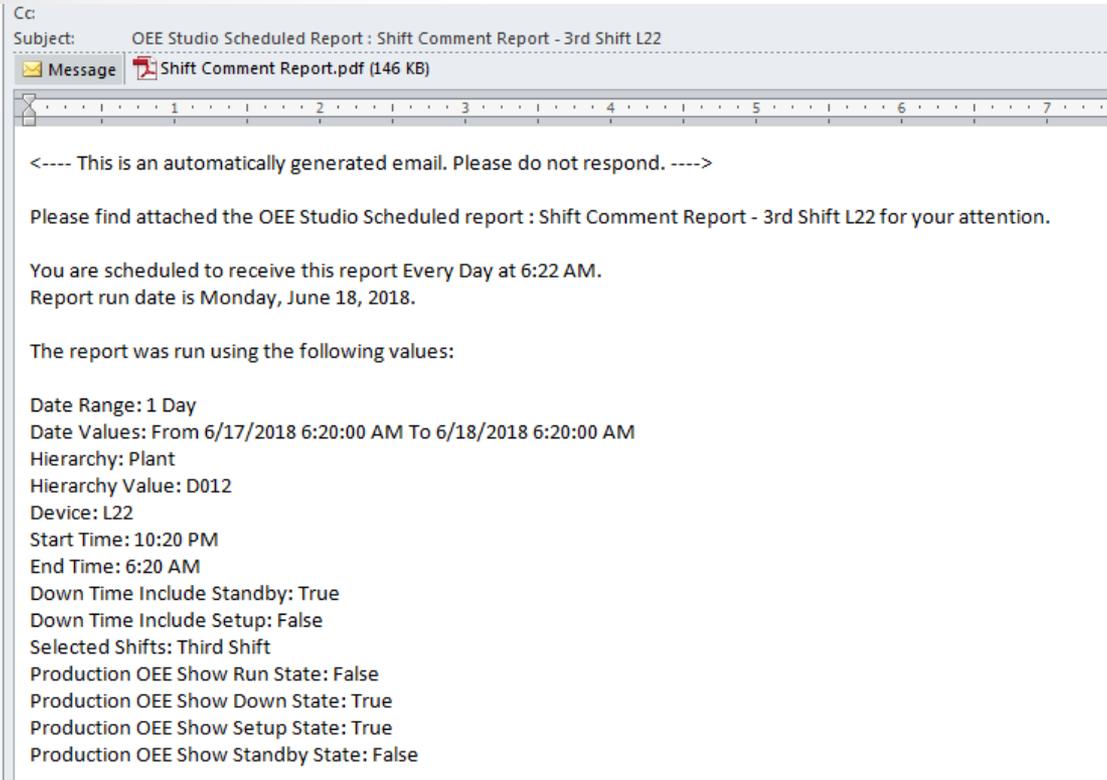
Date Range: 1 Day
Date Values: From 1/15/2019 5:00:00 AM To 1/16/2019 5:00:00 AM
Start Time: 5:00 AM
End Time: 5:01 AM

Hierarchy: Location
Hierarchy Value: Colorado Springs, CO
Selected Shifts: First Shift, Overtime, Second Shift, Third Shift

Down Time Include Standby: False
Down Time Include Setup: True
All Shift Production Report Grouping: 0
Top Losses Downtime: True
Top Losses Setup: True
Top Losses Standby: True
All Shift Production Report State Comparison: True
All Shift Production Report OEE Trend: False

- 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



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.

The screenshot displays a web application interface with a sidebar on the left and a main content area. The sidebar contains navigation links for Home, Dashboard, About, Favorites, Analysis, Trends, Availability, Performance, and Quality. The main content area is titled 'Saved Favorites' and features a search bar with 'Find' and 'Clear' buttons, and a 'Remove Filters and Revert to Default Layout' button. Below the search bar is a table with the following columns: Status, Title, Hierarchy, Group Name, Availability, Date Range, Schedule Status, Show, and Edit. The table contains several rows, with one row highlighted in orange. This row represents a scheduled report.

Status	Title	Hierarchy	Group Name	Availability	Date Range	Schedule Status	Show	Edit
	+ Screen: Availability - Graphical							
	+ Screen: Availability - Tabular							
	+ Screen: Job Analysis							
	+ Screen: Loss Events - Shift							
	- Screen: Shift Comment Report							
Active	Shift Comment Report - First Shift	Plant D012	First Shift Reports	All Users	Current Day	Scheduled	Show	Edit
	D012 L22 Created by vorneadmin 6/14/2018							
	+ Screen: Time & Frequency Trend							

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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