

Control IQ - Memorized Reports



Document revision as of v4.0
See Revision History at the end of the document

Version 4 rolls out the ability to define and remember reports so they can be generated day-after-day. With this new release, dynamic date ranges were put in place so these would 'roll-forward' as the reports are generated.

A memorized report becomes a point to the CIQ system.

Point type	Report
Alias	Defined in the report generator
Name	Defined in the report generator
Value	Is the last date/time the report was generated

For automatic generation of memorized reports, Proc has to "enable" the point. This can be done via any method similar to any other point in proc. (Schedules, Override On, Values being compared, etc.) Once the point has been enabled, it must be 'disabled' and re-enabled for the report to generate again.

On the report definition screen

Favorite Name:

This becomes the Point Name.

Alias:

This becomes the Point Alias

Destination:

View	This is a view on demand report. It does not get enabled by proc.
Email	This is emailed when enabled by proc.
File	This is stored as a file when enabled by proc.

Note Email and File destination will be "Viewed" only when the report is generated from the report screen. I.E. When looking at the report generator form, and pressing view, it will NOT cause the report to be stored to a file or emailed

Format:

Select from one of the report formats.
PDF, XLS, CSV, TSV

For Email Destinations, you may enter one or multiple email addresses (comma separated for multiple),

Email From: Reports@ControlIQ.Com
Subject: The Report Name

This will send a message to all email addresses. The email will contain a link to the report.

For File Destinations, you may enter the file path and name (optional) in the name field

1. If there is no path or filename the default will be:
[Drive]:\SAI\Applications\ControlIQ\CIQFiles\[report name].[report format]

Example

C:\SAI\Applications\ControlIQ\CIQFiles\Weather Report Last 30 days.PDF

This is accessible from within GUI as

<http://ipaddress/CIQFiles/Weather Report Last 30 days.PDF>

2. If there is a filename but no path (NOAA.PDF) the default will be:
[Drive]:\SAI\Applications\ControlIQ\CIQFiles\[report name].[report format]

Example

C:\SAI\Applications\ControlIQ\CIQFiles\NOAA.PDF

This is accessible from within GUI as

<http://ipaddress/CIQFiles/NOAA.PDF>

3. If there is a path but no filename the default will be:
MyPath\[report name].[report format]

Example

D:\Reports\Weather Report Last 30 days.PDF

4. If you enter a full path and filename, that is the location and name it will use.

Example

D:\Reports\NOAA.PDF

Notes.

- The CIQFiles location does no house cleaning. Once a file is there, it is up to the user

to clean it out.

- The CIQFiles location can be used to put any other documents that are globally accessible by GUI (at all work stations), manuals, pictures, etc. This can be accessed in the Tree or Views.
- By keeping a consistent file name, the report generator will “replace” the files in CIQFiles with the newest report as it generates. So as a link is created in Tree or Views it will always have the latest version of the report.

Revision History