

# User Guide

Document: Accord Process Audit V1.12 User Guide.Docx

# Accord >>

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# 1 Introduction

Accord Process Audit is a configurable query builder which returns historical information on processes or equipment values in a tabular format. Accord Process Audit is part of the Accord Platform, for systems developed using Accord Builder. Accord Process Audit obtains data from logs created by Accord Server as part of plant operation and monitoring. Accord Process Audit is a module in the platform, called as a program, and is also embedded in Accord HMI to provide flexible Alarm History management.

Using Accord Process Audit, personnel can configure reports on programs, alarms, equipment States or Values that have been logged by Accord Server. The reports are generated by selection of time frame, devices to be included, and properties of devices to be displayed in the report. Generated Process Audits may be stored (as templates) and recalled and a Process Audit may be automatically triggered on a new event in Accord Server.

Accord Process Audit requires that there is plant information data logged by Accord Server. Logging of individual devices is setup in Accord Server Settings section for Historian. Program Events and Operator Commands and Alarms are automatically logged.

Accord Process Audit may be used for data stored during Emulation or Testing, to assist with validation of Emulation or Testing.

The module provides the ability to export the current data being displayed to a variety of file formats.

Please see Accord Server User Guide for List of Modules and Definitions.



## 2 Installation

Accord Process Audit requires a good standard PC. Accord Server may require a high performance PC, depending on applications sizes and system requirements.

Process Audit is installed from Accord Setup Installer.

Accord Setup is started and Process Audit and any other required modules are selected. Server should be installed, either on this or a networked PC, to provide Database management.

🖟 Accord - InstallShield Wizard	×
Customer Information	
Please enter your information.	// Accord //
User Name:	
Engineer	
Organization:	
Logicon	
InstallShield	
	< Back Next > Cancel

Accord Setup.exe

1. Entry of User Name and Organisation



🖟 Accord	InstallShield Wizard			×		
Destinati Click Nex	Destination Folder Click Next to install to this folder, or click Change to install to a different folder.					
	Install Accord to: C:\Program Files\Accord 4\			Change		
InstallShield -		< Back	Next >	Cancel		

2. Installation Folder selection

🖟 Accord - InstallShield Wizard	×
Setup Type Choose the setup type that best suits your needs.	と
Please select a setup type.	
Full Installation	
Full installation with selectable features. Recommended for Server Installation.	
O HMI Runtime Client	
Installs HMI Runtime Client only. Recommended for HMI installation.	
InstallShield	Cancel

3. Installation selection



🖞 Accord - InstallShield Wizard 🛛 🗙	# Accord - InstallShield Wizard X
Custom Setup Select the program features you want installed.	Custom Setup Select the program features you want installed.
Click on an icon in the list below to change how a feature is installed.	Click on an icon in the list below to change how a feature is installed.
Install to:	Install to:
C:\Program Files\Accord 4\ Change	Change
InstallShield	InstallShield
Help         Space         < Back         Next >         Cancel	Help         Space         < Back         Next >         Cancel

4. Selection of Process Audit and any other required modules. The installation is to a ProgramFiles folder but may be changed. Server must be installed on this PC or on a networked PC.

**Note:** Modules are selected to be installed by default. Right-click to deselect installation of a module.

🛃 Accord - InstallShield Wizard X				
Ready to Install the Program The wizard is ready to begin installation.				
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.				
Setup Type:				
Full Installation				
Destination Folder:				
C:\Program Files\Accord 4\				
User Information: Name: User Company:				
InstallShield				
< <u>B</u> ack <u>Install</u> Cancel				

5. Installation is completed on pressing Install.



#### 2.1 Initial connection to Accord Server.

Process Audit module must connect to an Accord Server for data. Process Audit should find the Server module automatically if it is on the same PC.

1. Double click on Process Audit icon to start the application.



2. Check for the Connected to Service status at bottom of Screen.



#### **Process Audit Connection Status area**

3. If Disconnected or not connected to required IP then perform Search by clicking on the Connection Status (highlighted above).

This will cause following popup to appear with Green Refresh button at Bottom.



PrA Configuration				
Primary Connecti	on Redundant Connection Security	1		
Service Port:	5243 ≑			
Services:	127.0.0.1			
				2
<u>S</u> ave			Glose	

Accord Service Selection window

Click on the Green Refresh button to begin search for Accord Server by IP address.

PA Configuration	ı	8 ×
Primary Connection	Redundant Connection Security	
Service Port:	5243 🔶	
Services:	Searching - Please Wait	कर
Save		Gose

Accord Service searching

This will find the available Accord Servers, with appropriate IP addresses.



PA Configuration ? ×			
Primary Connection Redundant Connection Options			
Service Port: 5243			
Services:			
10.0.0.120			
10.0.0.123			
127.0.0.1			
	3		
Save	Close		

Accord Service Selection window

Select required Server.

If this does not return an appropriate IP then

Check that Accord Server is running.

Check that Accord Server PC is connected, if it is another PC.

4. After connection Log-In by clicking on the User: in the bottom of the Screen. Ensure that the User is already listed as a User in Server settings Security section.



#### 2.2 Initial Screen

On opening Accord Process Audit an initial screen is presented.

Accord Process Audit - 🗆 X				
File Edit View Windows Help				
i 🗋 📂 房 🕞 🕼 🖾 🙆	🗁 💭			
	Setup Devices Properties			
	Tvoe:  Fixed  Variable  Plan			
	From: Tuesday 05 April 2022@09:28:47			
	To: Thursday 07 April 2022 @ 09:28:47			
	Report Type			
	Program Event Summary Grouped			
	O List All Events			
	Ime Event      Include Operator Commands			
	Preferences			
	Show Logged Devices			
	Appearance			
	Title Row: LightSteelBlue V			
	Primary Row: AliceBlue ~			
	Secondary Row: Lavender ~			
	Generate Report			
Connected to Service '127.0.0.1' at 06/04/22 09:39:51.	User: test			

Ensure Process Audit is connected to Accord Server and Log-in as User at bottom of screen.

The Right Hand Side is a Configuration Panel and the Left Hand shows the Report data after generation.

In the Configuration Panel an individual report is configured for a Time Span, for Devices – with selected Properties - to be included, and for Preferences for presentation.



# **3** Report Configuration and Generation

# 3.1 Selection of Report Time Span

There are 3 Period Type selectable in the top panel: Fixed Time, Variable, and Plan.

Setup Devices Pro	perties	
Type:  Fixed	Variable	
From: Saturday 1	7 December 2016 @ 10:12:41	
To: Thursday 2	6 January 2017@10:12:41	
Report Type		
Program Event		
◎ List All Events <u>H</u>	Hours Minutes Seconds	
Time Event	0 😴 5 🚔 0 🚔	
Include Operator C	ommands	
Appearance		
Title Row:	LightSteelBlue -	
Primary Row:	AliceBlue 🗸	
Secondary Row:	Lavender	
Operator Commands:	PowderBlue	
Active Alarms:	Pink 💌	
Inactive Alarms:	PaleGreen	
Override:	WhiteSmoke	

**Report Period Type Selection** 



1. Fixed Time Span Report Type

This is for a Report between a Start Date and Time (From : ), until an End Date and Time (To : ). A Calendar is provided for date selection if required.

Setup Devices Properties		
Type:      Fixed	🔘 Variable 🛛 🔘 Plan	
From: Saturday 1	7 December 2016 @ 10:12:41	
To: Thursday 2	6 January 2017@10:12:41	
Report Type		
Program Event		
C List All Events	Hours <u>Minutes</u> <u>Seconds</u>	
Time Event	0 🚔 5 🚔 0 🚔	
Include Operator C	ommands	
Appearance		
Title Row:	LightSteelBlue 🔻	
Primary Row:	AliceBlue 🔹	
Secondary Row:	Lavender 🔹	
Operator Commands:	PowderBlue 🔹	
Active Alarms:	Pink 🔻	
Inactive Alarms:	PaleGreen 🔹	
Ovemide:	☐ WhiteSmoke ▼	

Select the required Start and End Times by clicking on calendar or entering values.



2. Variable Time Span Report Type

This is for a Report for a recent Period. The period may be defined for Days, Hours and Minutes.

Setup Devices Prop	perties	
Type:  Fixed	Variable	Plan
Time 2	0 🖨	0 🚔
Days	Hours	Minutes
Report Type		
Program Event		
◎ List All Events Η	lours <u>Minutes</u>	Seconds
Time Event	0 🚔 5	0
Include Operator Co	ommands	
Appearance		
Title Row:	LightSteelBlue	-
Primary Row:	AliceBlue	-
Secondary Row:	Lavender	-
Operator Commands:	PowderBlue	•
Active Alarms:	Pink Pink	•
Inactive Alarms:	PaleGreen	•
Override:	WhiteSmoke	•

Select the required Period by clicking or entering values.

#### 3. Plan Type Span

This is for Process Audit for Plan sequences as defined in Accord Plan module.

The required report is configured and then selected for Automatic generation at the end of a Plan.

The Plan Type is configured similarly to a Variable Type.



#### 3.2 Selection of Report Type for Program or Time Event Type

The Report may be configured for records for Program Events or Time Events

#### Program Event Type

This selection is used when the Report is to reflect Program events. There will be a new row for each Event for each Program included in the configuration.

Records are included for Program Start, End, Hold, Restart, TimeHold, Timing, Alarm, Change of Step.

Select the subtype for presentation

<u>Summary</u>: Use this selection to show Program Status and Device Values for included devices in a single row for each record.

<u>Grouped</u>: Use this selection if more information is required; all selected Status and Value information for all items are grouped together into a cell for each record.

#### Time Event

Use this selection when the Report is to show Values at selected Intervals. Selection will allow an Interval to be selected for Hours, Minutes and Seconds. The Report will return Values and Status in a new Row for each interval.

#### All Events

This selection is used when a new record is required for every Program or Device change and each record is to contain detailed information on all logged items at time of record.

#### 3.3 Selection of Appearance

These preferences are for the appearance of the Report.

This allows specification of different colours for record types to aid in interpretation. Colours may be assigned for Title Row, Primary and Secondary Rows, Operator Commands, Alarms, and Overrides.



#### 3.4 Selection of Devices to be included.

For this Devices refers to Equipment and Program items, and any item in the Model can be included here.

An explorer is provided for selection of items.

Click on the Devices tab and select items by Model (Project) and by Type and then the required Device item. Items from multiple Projects managed by Server may be included in a Report.



In case above one Model (Project) is being managed by Accord Server. Analog Input Instruments, Digital Input switch, Pump and PID Loop have been selected.

Devices are selected for Logging in Accord Server Historian. If a Device is not selected for logging in Server Historian then it will not have data for the Report.



#### 3.5 Selection of Properties of Devices.

Accord Process Audit allows for different properties to be included in a Report. In general Values and Activations are used, but it is possible to include any aspect of a Device. The properties are selected for inclusion by Device Type, so all included Devices of the Type will be represented in the same manner in the Report.

	D : Proportion
Setu	p Devices Properties
Grou	p: Analog Input 👻
	Property
	Status
	Value
	Override
	Maintenance
	Wire Break
	Alarm H
	Alarm HH
	Alarm L
	Alarm LL
	Alarm Value H
	Alarm Value HH
	Alarm Value L
	Alarm Value LL
	Current Over
	Current Under
	Hysterisis Setpoint
	Maximum Limit
	Maximum Range
	Minimum Limit
	Minimum Range
	Override Value
	Time Setpoint

In the selection the Analog Inputs are selected for including Value, Override, Maintenance and WireBreak Status. Properties are selected by Ticking the box beside the property.

#### 3.6 Activating the Report

There is a button 'Generate Report' at the bottom of the Setup Section. Clicking on this will cause the Report to be Generated. A status will be shown until the Report is Generated.

#### 3.7 Saving a Report

The generated Report may be saved for later usage. In the File Menu the following options are used.

Save	- Save a Generated Report
Save As	- Save Opened Report as a new Name
Export	- Export report data as Excel, .CSV, PDF, HTML or XML files



## 4 Report System Menu



Process Audit File Menu

The Accord Process Audit File Menu allows the following common File functions;

New - Generate a New Report.

An initial Screen is presented, without any selections or preferences.

#### <u>Open</u> - Open an existing Report

The Saved Process Audit may be re-opened. A Selection panel shows all the saved reports. Click on the Green Refresh button to refresh the list.

PA Report Selection	_		×
Reports on Server			
PrA Plan Test			
PrAtest			
PrA test2			
PrA Test3			
PrA Test4			
			0
Select		Close	

Saved Process Audit Selection panel



Delete - Delete a Report from the system

A Saved Report may be Deleted here. A Similar popup panel allows for selection of the report to be deleted.

Save - Save a Generated Report

This is to make a Saved Report. The Report is given a suitable name. If a Saved Report is being used for later Automatic generation then the automatic generation selection may be used to append the date and time to make a unique report for each instance.

Save As - Save Opened Report as a new Name

This is used to save an existing report, with modifications if required, under a new name.

<u>Export</u> - Export report data as Excel, .CSV, PDF, HTML or XML files Process Audit may be exported here. Export to Excel allows for further analysis as the user may require to do.

<u>Print</u> - Send report to Printer This allows the Report to be printed to the default printer on the computer.

Print Preview - Preview before Sending to Printer

This shows the Data that will be sent to the Printer.



# 5 Report Trigger Management

The Report Trigger Management tool allows users to manage automatic report triggers. A report trigger is a user configured event that automatically generates a report previously configured using Accord Process Audit. Report triggers can be configured to export report data in a variety of different formats, such as Excel, PDF and HTML. Additionally, report triggers can also be configured to automatically email Process Audit as long as an existing SMTP server has been configured.

Automatically triggered Process Audit are only available for Process Audit configured as Variable type.

Svr Report	Trigger l	Managemei	nt							— C		×
Туре	Report	Project	Group	Device	Property	State	Start Date	End Date	Last Run	Next Run	Interva	i i
Watched	Test3	CHM Foyne	Program	HCL Loading	Active	True -> Fal	N/A	N/A	N/A	N/A	None	
Watched	Test3	CHM Foyne	Program	NaOH 30%	Active	True -> Fal	N/A	N/A	N/A	N/A	None	
Scheduled	test	N/A	N/A	N/A	N/A	N/A	05/04/22 1	N/A	06/04/22 0	06/04/22 0	00:00:0	05:0
New		Edit	t in the second s	Note: Report triggered rep	s must be c ort.	ontigured as	"Variable" in	) order to be seled	cted as a	Delet	e Select	ed

The Report Trigger Management Tool



# The Report Trigger Management tool displays the following information:

Item	Description
Туре	Displays the type of the report trigger. There are two trigger types:
	> Watched
	The report is automatically generated based on a PLC event.
	Scheduled
	The report is automatically generated based on a user defined timed event.
Report	The name of the report that the trigger will automatically generate.
Project	The name of the project the watched device belongs too. This only applies
	to a Watched trigger.
Group	The name of the group the watched device belongs too. This only applies
	to a Watched trigger.
Device	The name of the watched device. This only applies to a Watched trigger.
Property	The name of the property of the device being watched. This only applies to
	a Watched trigger.
State	The state change that the trigger is watching. This can be a state change
	from true -> false or false -> true. This only applies to a watched trigger.
Start Date	The date when the report will first be generated. This only applies to a
	scheduled trigger.
End Date	The date when the schedule will end. This only applies to a scheduled
	trigger.
Last Run	The date when scheduled task last generated a report. This only applies to
	a scheduled trigger.
Next Run	The date when scheduled task will generate its next report. This only
	applies to a scheduled trigger.
Interval	The time interval in hours, minutes and seconds in which the report will
	generate the next report.

## 5.1 Accessing the Report Trigger Management Tool

Click the 'Report Trigger Management' shortcut above the right hand side panel.



#### 5.2 Defining/Editing a Report Trigger

Editing a report trigger is almost identical to creating a new report trigger. To perform either action:

1. Open the '**Report Trigger Management**' tool.

2. Click '**New**' to create a new trigger, otherwise click '**Edit**' adjacent the appropriate trigger.

This will produce the **Report Trigger Editor**. The Report Trigger Editor contains a variety of different settings users can configure to meet their needs. The editor contains three separate tabs:

Item	Description
Export As	This is where users define how the report should be generated. This
	includes defining the export type and how the file should be named.
Trigger Type	This is where users define the conditions on which the report should be
	generated. There are two types of triggers, Watched and Scheduled.
Email	This is where users define the email recipients (if any) for the report once it
	has been generated.

#### 5.3 Report Storage - Export As

Sr Report Trigge	er Eo	ditor		Ĩ	2	$\times$
Report: test					×	<u>Refresh</u>
Export As Trigg	er Ty	ype Email				
Export As:	C:\	10 Working	Files\Generated\Reports			Browse
Туре:	PD	F	~			
Separator:	Un	derscore	~			
Append Date:	$\checkmark$	20220406	[yyyyMMdd]	``	/	
Append Time:	$\checkmark$	100548 [H	Hmmss]	```	/	
Append Value:		Device (V	alue)			
		Project:	CHM Foynes Tanks			$\sim$
		Group:	Analog Device			$\sim$
		Device:	NaOH CV07 Bay 03 NaOH			$\sim$
		Property:	Auto Setpoint	$\sim$		
Save					Clo	se

Report Trigger – Export As



The Export As tab is used to define how the report should be generated. It contains the following configurable options:

Item	Description					
Export To	The location	in which the report will be exported.				
Туре	The file form	at for the report. These can be as follows:				
	> Exce	Excel				
	> Com	ma Separated Values (CSV)				
	> PDF					
	▶ нтм	L				
	> XML					
Separator	The separati	ng character that should be used to separate the Date, Time				
	and Value (if	selected). These can be as follows:				
	• None	2				
	• Blanl	k Space				
	• Minι	ıs Sign				
	• Unde	erscore				
Append Date	When ticked	, Accord Server will include the date the file was generated in				
	its name. T	here is a wide range of possible date formats that can be				
	chosen.					
Append Time	When ticked	, Accord Server will include the time the file was generated in				
	its name. T	here is a wide range of possible time formats that can be				
	chosen.					
Append Value	When ticked	, Accord Server will include a live PLC based value in its name.				
	This value ca	n exist in any active project available to Accord Server.				
	Item	Description				
	Project	The project that contains the device whose value will be used				
		as part of the file name.				
	Group The group type of the device whose value will be used as					
		of the file name.				
	Device	The device whose value will be used as part of the file name.				
	Property	The property of the device that will be used as part of the file				
	name. Only numeric based properties will be displayed					

#### 5.4 Trigger Type

Definition of event on which the report is generated. There are two types of triggers, Watched and Scheduled.



#### 5.4.1 Watched Triggers

Sr Report Trigge	r Editor			?	×
Report: test				$\sim$	<u>Refresh</u>
Export As Trigge Scheduled:	r Type Emai Device (Wa Project: Group: Device: Property: Report On:	I tch) CHM Foynes Tanks Program 0 Safety Common Active True -> False False -> True	~		
Save	]			Clos	se

# Report Trigger – Trigger Type (Watched)

The following configurable options exist for a watched trigger:

Item	Description
Scheduled	When ticked the report will generated based on a schedule, when un-ticked
	the report will generate based on a PLC event.
Project	The project that contains the device whose state will be used to trigger the
	report.
Group	The group type of the device whose state will be used to trigger the report.
Device	The device whose state will be used to trigger the report.
Property	The property of the device that will be used to trigger the report. Only
	Boolean based properties will be displayed.
Report On	The action that triggers the report. This can be either of the following:
	True -> False
	• False -> True
	For example, when set to 'True -> False' and the property changes from
	false to true the Data Reporting module records this as the Start Date of the
	report. When the property changes from true to false the Data Reporting
	module records this as the End Date and generates the report using both
	dates as the time window for report data.



#### 5.4.2 Scheduled Trigger

Sr Report Trigge	Sr Report Trigger Editor						
Report: test					~	<u>Refresh</u>	
Export As Trigge	r Type Emai	il					
Scheduled: 🗹	Activation S	Setup					
	Start Date:	04 April	2022, 17:01	:38			
		Repeat					
	Interval:			Minutes		~	
		End On [	Date				
	End Date:	04 April	2022, 17:01	:38			
Save	]				Clo	se	

Report Trigger – Trigger Type (Scheduled)

The following configurable options exist for a scheduled trigger:

Item	Description
Scheduled	When ticked the report will generated based on a schedule, when un-ticked
	the report will generate based on a PLC event.
Start Date	The date when the trigger will first generate the report.
Repeat	When ticked the trigger will repeat the task after a user defined period of
	time has elapsed.
Interval	The time interval in hours, minutes and seconds in which the report will
	generate the next report.
End On Date	When ticked the trigger will only repeat the task until a user defined point
	in time.
End Date	The date when the trigger will stop processing.



#### 5.4.3 Automatic Email

	S. Report Trigger Editor				
Report: CIP Full Clean			<u>Refresh</u>		
Export As Trigger Type Email					
	User	Email			
	John_Smith	johnsmith@email.com			
	TimSexton	tsexton@logicon.ie			
	<u>S</u> ave	Qlose	e		
L					

Report Trigger – Email

This is where users select from a list of existing security users that possess an email address as recipients for the automatically generated report. Email selection is completely optional and requires an SMTP server to function.



## 5.5 Configuring Triggers

The type of trigger for a report is based on requirements. A watched trigger allows a report to be generated based on PLC event, meaning the time-frame for the report data will be based on that event. This is useful when reporting on events such as the lifetime of an alarm or the activity of a phase during a process cycle.

A scheduled report is generated based on a predefined time event that is essentially fixed. As a result, a scheduled report will not change the Process Audit time-frame, making it only useful when dealing with a report using variable timing. An example of the usefulness of such a report is reporting on all activity in the last 24 hours every 24 hours. Since the report will always execute at the same time every day, the report will consistently report upon the last 24 hours each time it is triggered.

#### 5.5.1 Watched Trigger

To configure a watched trigger:

- 1. Open the '**Report Trigger Management**' tool.
- 2. Click 'New' to create a new trigger, otherwise click 'Edit' adjacent the appropriate trigger.
- 3. On the '**Report Trigger Editor**', select the desired report from the '**Report**' list.
- 4. If the desired report is not available click '**Refresh**'.
- 5. Select the '**Export As**' tab. By default this tab is selected.
- 6. Click '**Browse**' to select the file export location.
- 7. Click '**Ok**'.
- 8. Select the export type from the '**Type**' list.
- 9. Select the file name separator from the '**Separator**' list.
- 10. If the date is required in the filename tick '**Append Date**' and select a date format from the adjacent list, otherwise un-tick '**Append Date**'.
- 11. If the time is required in the filename tick '**Append Time**' and select a time format from the adjacent list, otherwise un-tick '**Append Time**'.
- 12. If a PLC value is required in the filename tick 'Append Value', otherwise un-tick 'Append Date'.
- 13. Select the desired project from the '**Project**' list.
- 14. Select the desired group from the '**Group**' list.
- 15. Select the desired device from the 'Device' list.
- 16. Select the property value to be included in the file name from the '**Property**' list.
- 17. Select the '**Trigger Type**' tab.
- 18. Ensure '**Scheduled**' is un-ticked.
- 19. Select the desired project from the '**Project**' list.
- 20. Select the desired group from the '**Group**' list.



- 21. Select the desired device from the 'Device' list.
- 22. Select the property value to be included in the file name from the '**Property**' list.
- 23. Select the report conditions, either 'True -> False' or 'False -> True'.
- 24. Select the 'Email' tab.
- 25. Tick the box adjacent the email address for each user to receive the automatically generated report.
- 26. Click 'Save'.

# Note: Accord Server does not need to be restarted, the new/edited trigger will be automatically loaded by Accord Server during its next check cycle.

#### 5.5.2 Scheduled Trigger

To configure a scheduled trigger:

1. Open the '**Report Trigger Management**' tool.

2. Click '**New**' to create a new trigger, otherwise click '**Edit**' adjacent the appropriate trigger.

- 3. On the '**Report Trigger Editor**', select the desired report from the '**Report**' list.
- a. If the desired report is not available click '**Refresh**'.
- 4. Select the '**Export As**' tab. By default this tab is selected.
- 5. Click '**Browse**' to select the file export location.
- 6. Click '**Ok**'.
- 7. Select the export type from the '**Type**' list.
- 8. Select the file name separator from the '**Separator**' list.

9. If the date is required in the filename tick '**Append Date**' and select a date format from the adjacent list, otherwise un-tick '**Append Date**'.

10. If the time is required in the filename tick '**Append Time**' and select a time format from the adjacent list, otherwise un-tick '**Append Time**'.

11. If a PLC value is required in the filename tick '**Append Value**', otherwise un-tick '**Append Date**'.

- a. Select the desired project from the '**Project**' list.
- b. Select the desired group from the '**Group**' list.
- c. Select the desired device from the '**Device**' list.
- d. Select the property value to be included in the file name from the '**Property**' list.
- 12. Select the '**Trigger Type**' tab.
- 13. Tick 'Scheduled'.
- 14. Select the '**Start Date**' by clicking on the calendar button to the right side of the field.
- 15. If the schedule needs to run more than once tick '**Repeat**', otherwise leave it unticked.



- 16. Select the time interval by adjusting the arrows up or down on the right side of the 'Interval' field. The field displays the time interval in the format of hh:mm:ss. To adjust hours, select the hour's portion of the control and adjust it by clicking the arrows.
- 17. If the schedule needs to end on a specific date tick 'End On Date', otherwise leave it un-ticked.
- 18. Select the '**End Date**' by clicking on the calendar button to the right side of the field.
- 19. Select the '**Email**' tab.
- 20. Tick the box adjacent the email address for each user to receive the automatically generated report.
- 21. Click **'Save'**.

# Note: Accord Server does not need to be restarted, the new/edited trigger will be automatically loaded by Accord Server during its next check cycle.

#### 5.5.3 Deleting a Report Trigger

To delete an existing trigger:

- 1. Open the '**Report Trigger Management**' tool.
- 2. Click '**Delete** adjacent the appropriate trigger.

Note: Accord Server does not need to be restarted, the trigger will be automatically be removed by Accord Server during its next check cycle.