8. Reporting

Hardware manual

www.pinetek-networks.com

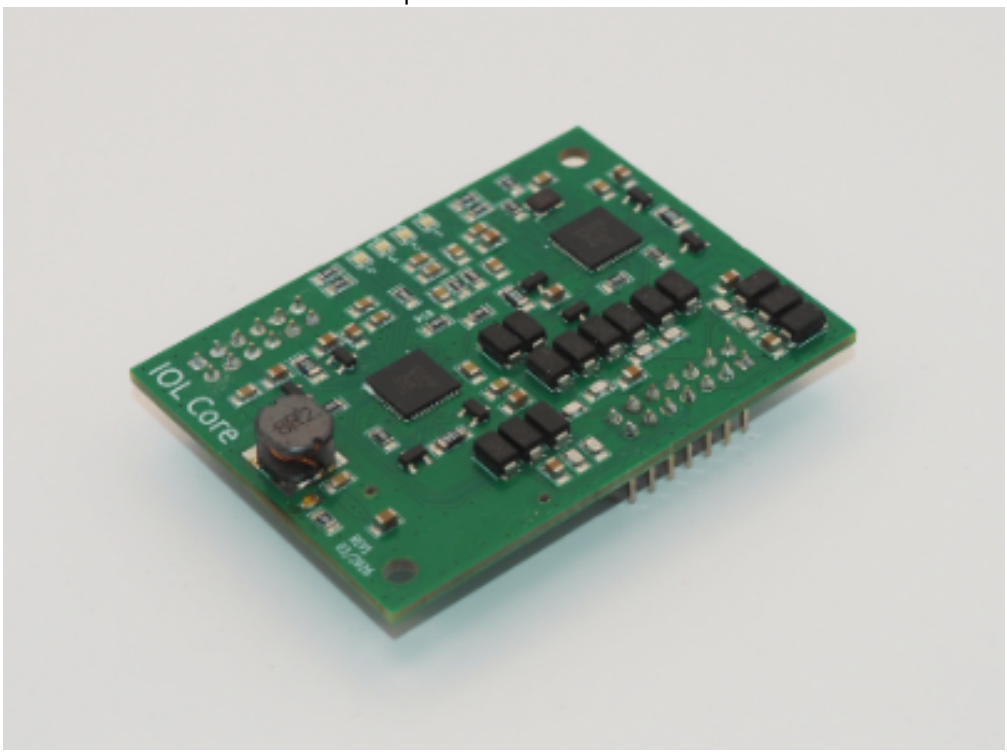


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8. Reporting

Pinetek Insight generates PDF reports from your production data, automatically at run end, on a schedule, or on demand, and can send them by e-mail. Report management requires the **Admin** role and is found under *System → Reports*.



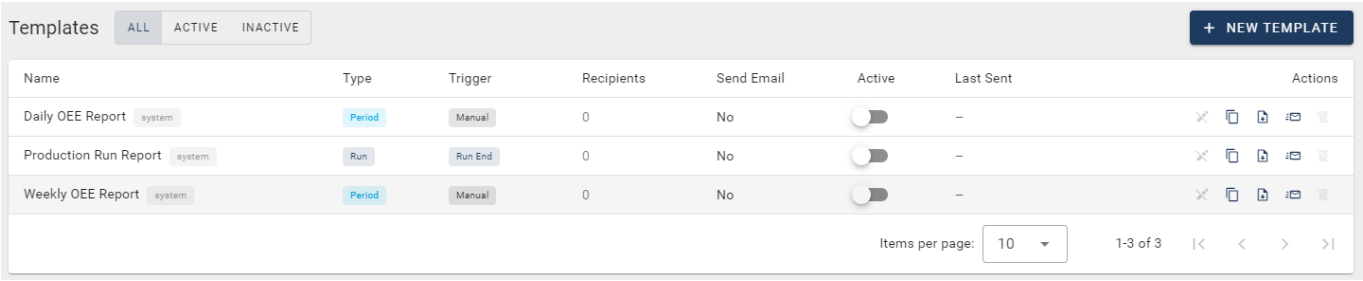
E-mail dispatch requires configured SMTP settings (chapter 9.4). Reports are generated in the system language (chapter 9.1).

8.1 Concepts

Element	Purpose
Template	A report definition: type, trigger, filters, recipients and an ordered list of sections
Block	A reusable content element (HTML). Types: *Header*, *Footer*, *Section*
Common Layout	The shared header/footer used by all templates unless overridden

A template is assembled from blocks; generated PDFs are archived per template.

8.2 Report templates

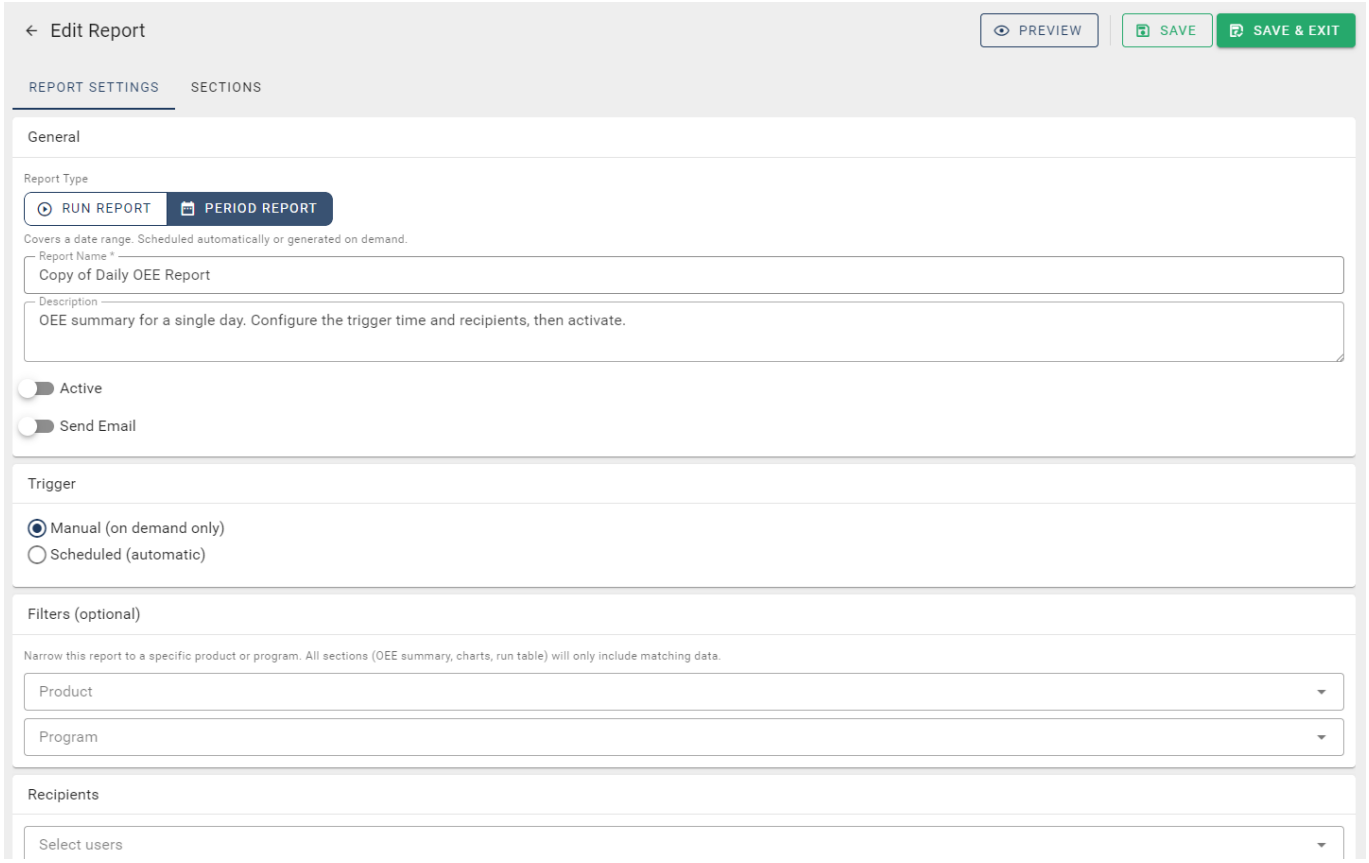


System → Reports → Templates lists all templates with type, trigger, recipients, e-mail flag, active flag and last-sent time. From the list you can **Generate / Download PDF**, send a **test e-mail**, edit, duplicate, activate/deactivate or delete a template (deleting also removes its archived PDF files). Templates marked **system** are predefined and cannot be edited or deleted.

There are two report types:

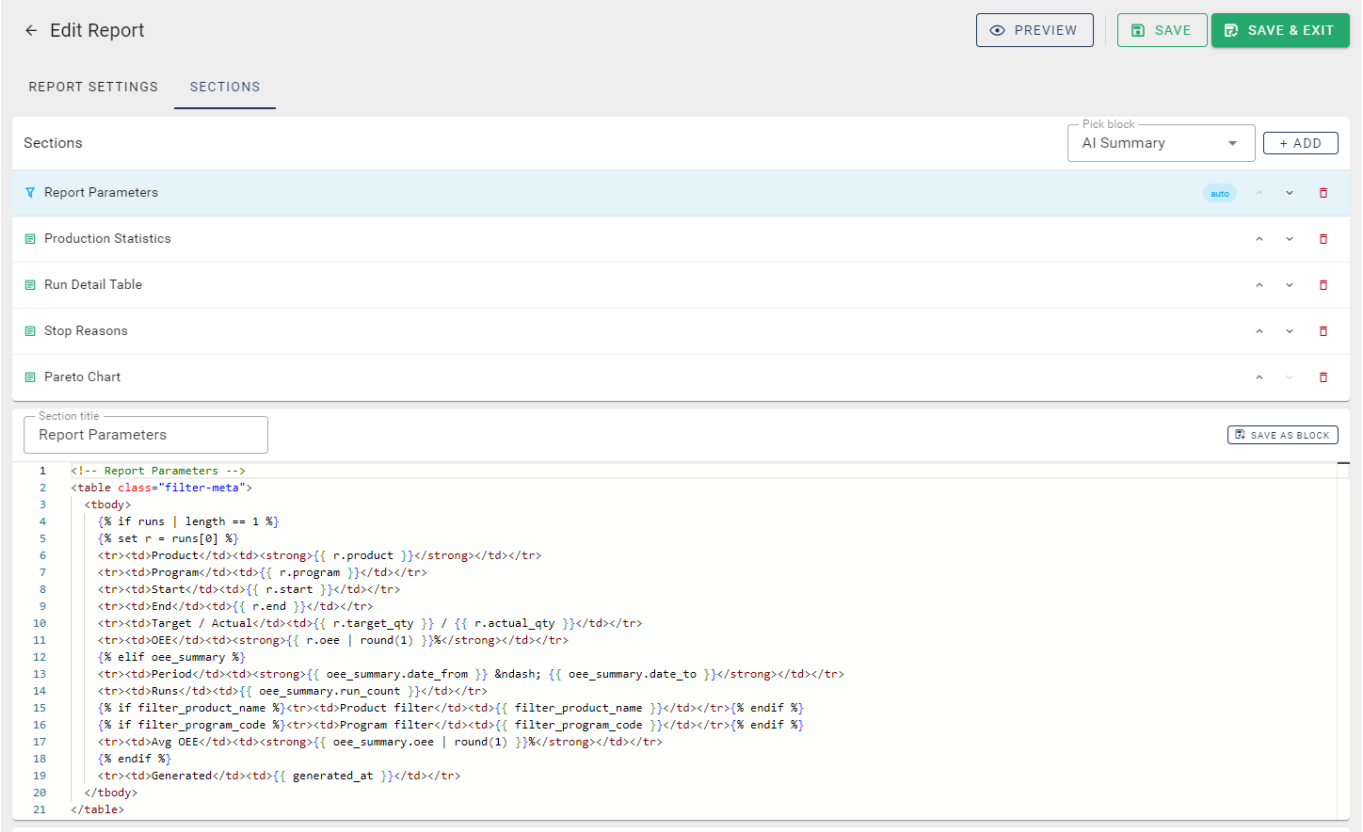
- **Run Report:** covers a single production run. Generated at run end or on demand (you pick the run; defaults to the most recent completed run).
- **Period Report:** covers a date range. Generated on schedule or on demand (you pick the range).

8.3 Creating and editing a template (Report Builder)

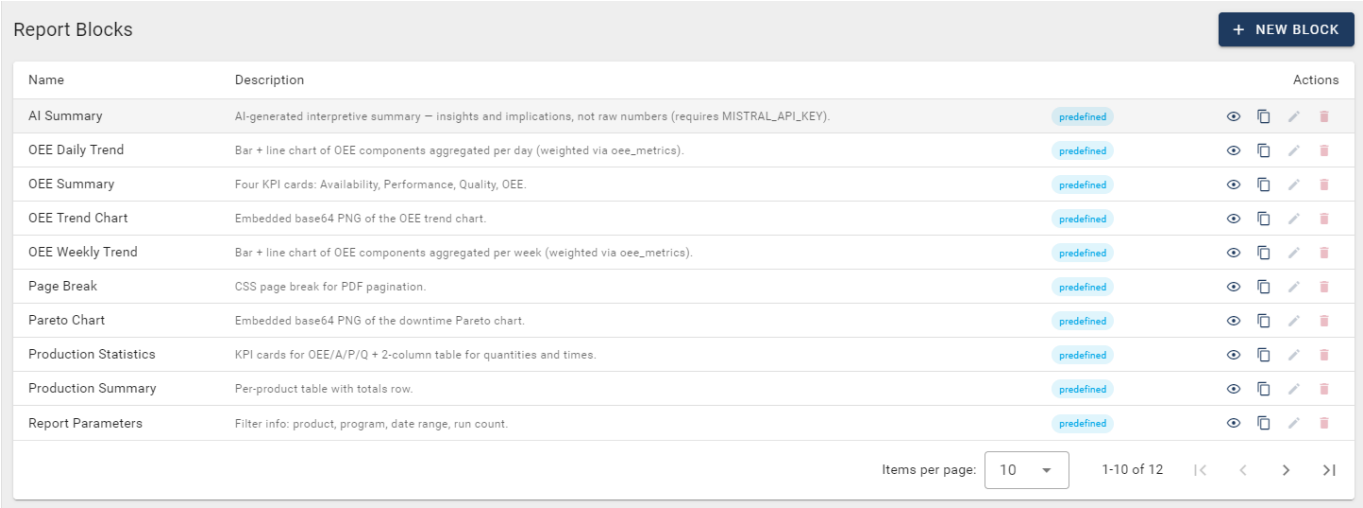


New Report opens the Report Builder:

- **General:** name, description, report type, active flag.
- **Trigger:**
  - **Manual **(on demand only), * **Triggered at Run End:** generated automatically when a production run is stopped (run reports), or
  - **Scheduled (automatic):** for period reports, choose the report period (rolling window: daily / weekly 7 days / monthly 30 days / quarterly 90 days), the run-at time (HH:MM) and, for weekly/monthly schedules, the day of week / day of month.
- **Filters (optional):** narrow the report to a specific product or program; all sections (OEE summary, charts, run table) then include only matching data.
- **Recipients:** select users; enable Send Email to dispatch the PDF automatically.
- Header & Footer: by default the shared Common Layout is used (). Enable Custom header/footer to override for this template only; you can load the common layout as a starting point.
- **Sections:** pick a block from the library and Add it; reorder with Move up / Move down. Click a section to edit its title and HTML content directly in the built-in editor; Save as Block stores an edited section back to the library for reuse.
- Generate Preview: renders the report with chosen parameters (run or date range) before saving.



8.4 Blocks library

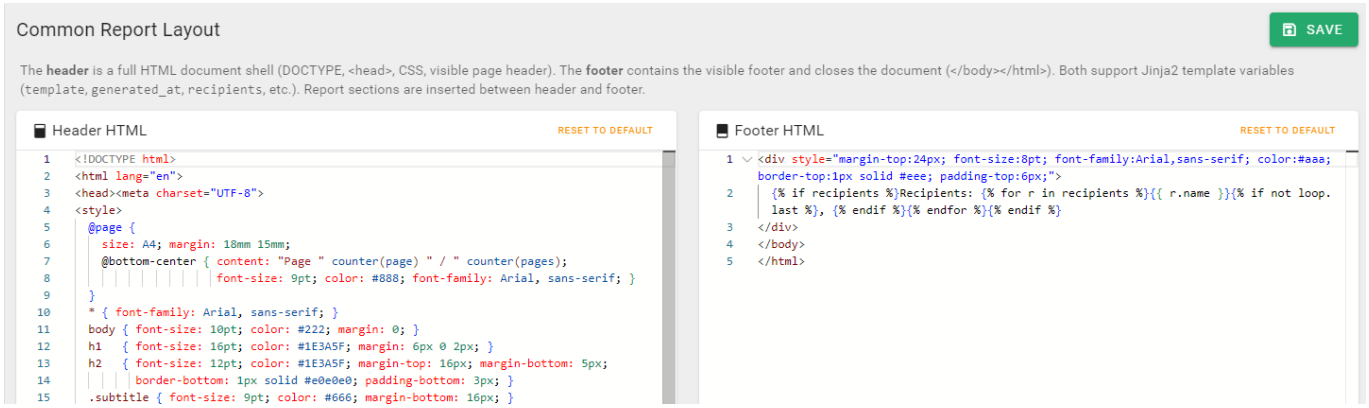


System → Reports → Blocks manages the reusable content elements. Each block has a name, description, type (*Header*, *Footer*, *Section*) and HTML content with Jinja2 template variables (8.6).

- **Predefined blocks** (OEE summary, run table, downtime table, charts, standard header/footer, ...) are system-owned: they can be viewed and duplicated, but not edited or deleted. To customise one, duplicate it and edit the copy.
- **Custom blocks** can be created, edited, previewed, duplicated and deleted freely.



8.5 Common Layout



System → Reports → Layout defines the shared header and footer HTML used by all templates that do not override it. **Edit**, **Preview**, or **Reset to default**. A table of the available template variables is shown in the editor.



Typical use: put your company logo and report title in the common header once; every report uses it automatically.

8.6 Template variables

Block HTML is rendered with Jinja2. The most important context variables:

Variable	Content
`runs`	List of the production runs in scope, with per-run OEE fields

Variable	Content
`runs_by_product` / `runs_by_program`	The same data grouped and aggregated per product / program
`oee_summary`	Weighted OEE totals for the whole scope (availability, performance, quality, OEE, quantities)
`reasons`	Downtime reasons with durations
`charts`	Pre-rendered charts (embedded images)
`generated_at`	Generation timestamp
`filter_*`	The active filters (period, product, program)
`t`	Translation dictionary: write `{{ t.oee }}`, `{{ t.availability }}` etc. so one block renders correctly in any report language

The full, current variable list is displayed inside the Report Builder and the Layout editor (**Available Template Variables**).

8.7 Generating, testing and dispatch

- **On demand:** *Templates* list → **Generate / Download PDF**; pick the run (run report) or date range and optional filters (period report).
- **Test e-mail:** sends a generated report to a single address of your choice; use this to verify SMTP and layout before enabling automatic dispatch.
- **Run end:** active run-end templates are offered for dispatch in the Run Complete dialog (chapter 5.2.4).
- **Scheduled:** active scheduled templates are generated and e-mailed automatically at the configured time; *Last Sent* in the list shows the most recent dispatch.