



PlantUnity Historian Explorer: User Guide (v0.5.0)

Audience: process-control / I&C engineers, system integrators, OT and automation data teams. Scope: everything an engineer needs to install the app, accept the licence agreement, load DeltaV Continuous Historian (.xhc) archives, browse and chart tags, export to CSV / Excel / SQLite, use the **Ask Historian** chat layer, and understand the licensing that v0.5.0 introduces: Free demo, buying a licence from the app, activation, data allowances, offline behaviour and update notices.

Figures marked [Figure to recapture at the release VM proof: ...] are placeholders. This guide was prepared without a running app; those screens changed or are new in v0.5.0 and their pictures are taken during the release proof on the VM. The two export-bar figures are unchanged since v0.4.0 and are kept.

1. What is PlantUnity Historian Explorer

PlantUnity Historian Explorer is a standalone Windows desktop application that opens DeltaV Continuous Historian .xhc archive files directly. There is no historian server to stand up and no database to install. Point the app at a folder of .xhc exports and the engine parses every file in place, builds an in-memory store of every tag, and exposes the data through a tags browser, a files browser, an interactive trend chart, and a multi-format export pipeline (CSV, Excel, SQLite that mirrors the PlantUnity HIST schema). The data stays on the workstation. The only things that reach Bravura-AI's service are the ones this guide names: licence checks, the update check, purchases, and, when you turn it on and choose it, the hosted Ask Historian provider.

Ask Historian. An **Ask** button in the main window opens the chat panel next to **Tags** and **Files**. You ask questions about the loaded .xhc data in plain English (“what was the max OUT.CV of 100-FIC-102 last month?”, “which tags spiked yesterday?”), and the assistant answers with citations back to the source .xhc file. The chat is provider-agnostic: Bravura-AI hosted AI, your own key for one of seven providers, or a local model through Ollama or LM Studio. It reports the exact sample count under every answer and supports per-session audit-log export.

What is new in v0.5.0.

- **Online licensing.** A licence is now bought from the app and activated with an activation key; the app keeps it fresh with the licence service. What is on sale: the **Pro** monthly subscription, and **Site** by quote. The Free demo, fixed-term licences issued by Bravura-AI and legacy .bravlic files are described in section 3.
- **The Free demo through Bravura-AI's service.** The Free demo's two hosted questions now go through Bravura-AI's AI service. No provider key is built into the app any more. Section 3.2.
- **Data allowances in MB and GB.** Exports count .xvc history data in MB (or GB), not files. A subscription's allowance renews every month; a Free or fixed-term licence (or a perpetual one issued under earlier terms) has a pool that does not renew. Section 7.1.
- **Licence agreement 1.1.** The app asks you to accept it on first start. Section 2.3.
- **Hosted AI is off until you turn it on,** and the hosted model is shown as "Bravura-AI hosted AI", never by a model name. Sections 8 and 9.
- **Update notice.** The app tells you when a newer version exists. Section 2.5.
- **Telemetry is gone.** The anonymized usage-metrics toggle of earlier builds was removed; there is no telemetry code path in the app or the sidecar.
- **Naming.** The installer, its shortcut and the Apps & Features entry are named **Bravura-AI Historian Explorer**; the windows, wordmark and messages inside the app read **PlantUnity Historian Explorer** (display text only; nothing about your data or licence is keyed on it). Section 2.2.

Everything from v0.4.0 about loading, browsing, charting and exporting data is unchanged and is repeated in sections 4 to 7.

Quick tip: the rest of this guide walks the app top to bottom. To try the headline feature, skip to section 8 (Ask Historian).

2. Installing and first launch

For v0.5.0 the installer is:

- **Filename:** Bravura-AI Historian Explorer_0.5.0_x64-setup.exe
- **Type:** Windows NSIS installer (Authenticode-signed)
- **Requirements:** Windows 10 or 11, 64-bit, with the WebView2 runtime (preinstalled on current Windows builds)

Steps:

1. Download the installer from the location Bravura-AI gave you.
2. Run the installer and click through the NSIS wizard. The app installs for the current user by default and adds a Start-menu shortcut. If you are upgrading from v0.4.0 or v0.3.x, see section 2.4.
3. Launch the app from the Start menu. A splash window appears while the Python sidecar starts in the background; the main window opens once the sidecar handshake completes.
4. On first launch the app shows the licence agreement (section 2.3). After you accept it, the main window opens with the header, the licence chip and the empty tags and files panes.

[Figure to recapture at the release VM proof: the main window straight after launch, before any data is loaded, with the licence chip of a clean install]

Without a licence the app runs as the **Free demo** (section 3.2). Sessions of the Free demo are limited to 15 minutes each; a countdown sits in the licence chip, and a **Demo session ended** overlay asks you to restart the application when the time elapses.

Sidecar handshake errors. If the Python sidecar fails to start within the safety timeout, the splash window stays visible and shows a specific error message instead of disappearing, with a **Retry** button and a **Copy diagnostics** button that puts the sidecar stderr and the bootstrap log on the clipboard for a support ticket.

*Quick tip: if Windows SmartScreen warns about the publisher, click **More info** then **Run anyway**. The installer is Authenticode-signed.*

2.1 What the app talks to

The app opens connections for these purposes only: the licence service (activation, refresh, release, offers), the store web page that you open in your browser when you buy, the update check (section 2.5), the hosted AI service when you enabled it and chose it, and a model provider you configured yourself (your own key, or Ollama or LM Studio). Opening and charting .xfc files never needs a connection.

2.2 Names you will see

Tauri's installer derives the installed program's identity from the product name, so the **installer file, the Start-menu shortcut, the install folder and the Apps & Features entry** are named **Bravura-AI Historian Explorer**. Inside the app, the window titles, the splash, the header wordmark, the licence and update messages and the licence agreement read **PlantUnity Historian Explorer**. This is display text only. The bundle identifier, the state folder (~/.bravura-historian), the executable names and the licence and update channels are the same as in v0.4.0, so the upgrade is an ordinary in-place upgrade (section 2.4).

2.3 The licence agreement (ULA 1.1)

On first start, and again if you never accepted it, the app shows the **licence agreement** over the main window: "Read the agreement below. You must accept it to use the app, activate a licence or buy one. Version 1.1." Choose **Accept** to continue. Choose **Decline** and the app tells you that it "cannot be used without accepting the agreement"; you can read the agreement again or close the app.

[Figure to recapture at the release VM proof: the licence agreement overlay, version 1.1, with Accept and Decline]

The acceptance is recorded on this computer with the agreement version. Three situations bring the overlay back or change it:

- **Not accepted yet.** Anything that talks to the licence service (activating a licence, starting a purchase, the Free demo's hosted questions) is refused until you accept: "The licence agreement has not been accepted on this computer. Accept it to continue."
- **The service names a newer agreement than this build bundles.** The app cannot show text it does not have, so it never records an acceptance of it. The message reads: "The licence agreement has been updated, and this version of the app does not

include the new text. Update the app to continue.” Local use is not affected; only the operations that talk to the licence service are refused.

- **Accepted locally but not confirmed by the service.** For example when you were offline during a refusal: “The licence agreement is accepted on this computer, but the server’s current agreement could not be checked. Connect to the internet and try again.” The overlay offers **Retry** and **Close**.

The **About** button in the header opens a panel with the version, the licence details and the legal notices.

2.4 Upgrading

The v0.5.0 installer can be run on top of v0.4.0 or any v0.3.x install. The upgrade is in place and non-destructive:

- **Settings, chat history and data stay.** `~/ .bravura-historian/` is left untouched: saved keys, chat sessions, audit logs, usage counters and the cached `.xfc` index carry over.
- **An activated legacy `.bravlic` file keeps working** for what it covered (see section 3.6). The hosted AI path that those files used to unlock is retired in v0.5.0.
- **The bundled user guide is replaced, not accumulated.** The installer deletes the previously bundled guides (including v0.4.0’s) and installs `user-guide-v0.5.0.pdf`, so the install directory carries exactly one copy of this document. The **User guide** button in the header opens it.

Quick tip: after upgrading, check Apps & Features. You should see exactly one entry for this product, spelled Bravura-AI Historian Explorer.

2.5 The update notice

The app asks the licence service’s public information page, once shortly after start and again from time to time, whether a newer version exists. When one does, a banner appears: “A new version of PlantUnity Historian Explorer is available: <latest> (you have <current>). Your data and licence stay as they are.” The buttons are:

- **Download:** opens the download page in your browser. The app only opens a link that points at a host the licence service named for downloads, over https.
- **Remind me later:** hides the banner for 7 days. The banner is never shown while an export runs. If your licence says this version is not covered, the banner is not hidden, because it is the way forward.
- **Check for updates:** in the licence panel, asks right now. The answer reads “A new version is available.” or “You have the latest version.” If you are working offline it says so (“You are working offline. Turn off Work offline to check for updates.”), and if the licence service is not reachable it says to try again when online.

The update check sends nothing about your data. The licence panel also carries the same notice as a row, so the Download button can be found after you dismissed the banner.

[Figure to recapture at the release VM proof: the update banner with Download and Remind me later]

3. Licensing

Click the **licence chip** at the top right of the header to open the licence panel. The chip reads the plan name once a paid licence is installed (for example “Pro Monthly”), with a short state when something needs attention (for example “Pro Monthly - payment overdue”). On the Free demo it reads **Free** with the tags left of the demo and the session countdown.

[Figure to recapture at the release VM proof: the licence panel of a clean install, showing the Free demo and the Buy a licence section]

3.1 What the licence panel shows

For an installed licence the panel shows a headline for the licence state, the plan, the **Connection** (Online, Offline, Offline (by choice)), a **Work offline** checkbox, **Refresh now**, **Buy top-up** (when top-ups are on sale), **Release this computer**, the **Activation key** section, and the allowance rows of section 7. The plan on sale in v0.5.0 is **Pro**, billed **Monthly** (the licence shows “Pro Monthly”). **Site** is sold by quote: contact Bravura-AI. A **(fixed term)** licence is issued by Bravura-AI. The other names the app can show (**Lite**, **Team**, **Annual** and **(perpetual)**) appear only on licences issued under earlier terms; they cannot be bought now.

Headline	What it means
<plan>: active	The licence is valid. A subscription reads “Paid through <date>.”; a fixed term reads “Valid until <date> UTC.”
<plan>: renews soon	A subscription is close to its paid-through date. It renews automatically; if the payment fails, renew it in the customer portal.
<plan>: working offline	The licence service has not been reached since the last check. The app keeps working on the licence already on this computer until the shown time. Connect and choose Refresh now .
<plan>: payment overdue	A subscription’s paid period ended and the grace period is running. The app keeps working until the grace end. Check the payment in the customer portal.
<plan>: subscription ended	Paid period and grace ended. Open, browse and licence management still work; Exports, Advanced Export, Ask and External MCP are off. Renew, then choose Refresh now .
<plan>: read-only	The licence could not be renewed in time. Browsing and licence management work; Exports, Advanced Export, Ask and External MCP are off until you connect and choose Refresh now .
<plan>: ends soon / licence period ended	Fixed term, see section 3.4.

Headline	What it means
<plan>: this version is not covered	This build was released after the end of what your licence covers. The message names the version to install, or how to renew.
<plan>: check the clock	This computer's clock is earlier than a time the licence has already reached. Correct the date and time. Browsing and licence management still work.
<plan>: released from this computer	The seat was released here. Enter your activation key again to use the licence on this computer.
No licence on this computer	"Buy a subscription or enter the activation key from your purchase email."

3.2 The Free demo

Without a licence the app is the Free demo. The licence panel states its limits: **Free demo. Up to 100 MB of .xhc history data, 10 tags, 2 AI questions to try Ask Historian, CSV only, 15-minute sessions. Activate a license to unlock more.**

- **AI questions.** The demo's two hosted questions are counted per computer for life, by Bravura-AI's service, not by the app. The Ask panel's header shows the count as **N hosted left**; it moves after each hosted question. The demo's hosted questions go through the same hosted AI service as a paid licence, and need an internet connection, the accepted licence agreement (section 2.3) and hosted AI to be enabled (section 8).
- **Provider.** The Free demo permits the hosted provider only. Your own key and local models need a paid licence.
- **When the demo's questions are used up or the service is busy,** the app shows its own fixed messages: "The Free demo is not available right now. Try again later, or get a licence for more AI questions.", "The Free demo is busy today. Try again tomorrow, or get a licence for more AI questions." and "The 2 free demo questions of this computer are used up. Get a licence for more AI questions." They point to a licence, because your own key and local models are available only with a paid licence. The message "Hosted AI is off. Open the Ask panel settings and choose Enable hosted AI to turn it on." appears on every licence when hosted AI has not been enabled.
- **Data.** CSV export only, up to 100 MB of .xhc history data and 10 tags. The panel shows the MB used.

3.3 Buying a licence from the app

In the licence panel choose **Buy licence** (the section is titled **Buy a licence**, or **Your purchase** while one is open). The app prepares a purchase and opens the store page in your default browser. The store page is the one Bravura-AI publishes for buying; nothing is paid inside the app.

1. Choose the Pro monthly plan on the store page and complete payment in the browser. The panel reads "Complete payment in your browser, then return here. This purchase is saved." The panel updates by itself.

2. When payment is confirmed the panel reads “Payment is confirmed. Finish activation on this computer.” and activates the licence for you, or shows **Finish activation**. If the installation that started the purchase changed, the panel says so (“The originating installation changed. Your purchase is saved.”) and asks you to contact support before continuing.
3. The headline switches to the plan, for example “Pro Monthly: active”.

Other buttons on the purchase view: **Open purchase page**, **Check payment**, **Hide purchase** (the purchase stays saved; activation continues when the app is open and online), **Back to purchase** and **Try connection again**. The price list shown comes from the licence service; the checkout page shows the final amount. If the app cannot reach the service, it shows the store’s website address and offers **Open website** and **Copy website address**, so you can buy from a connected browser or another computer and enter the activation key later.

[Figure to recapture at the release VM proof: the licence panel with the Buy licence view and a purchase waiting for payment]

Activation key. When you buy from the app, the app collects the licence for this computer and activates it itself; you normally do not type a key. The **Activation key** section is for a key you were given separately, for example a licence issued by Bravura-AI, or when the app asks you to enter the key for your purchase. If the app reports that automatic key recovery needs support, keep the order reference and contact Bravura-AI. The key starts with HE1- followed by groups of characters; the app checks the typing and tells you if the check character does not match. Paste it and activate. If the computer already has an active licence, the app asks “Replace the current licence on this computer?” and replaces nothing unless you confirm.

Release this computer. The button frees the seat on the licence service so the licence can be used on another computer. The app asks first: “Release this computer? The seat is freed on the licence server so the licence can be used on another computer. Paid features stop here until you activate this computer again with your activation key. Your data stays on this computer.”

Buy top-up. Top-ups are not on sale at the launch of v0.5.0, so the **Buy top-up** button does not appear yet. It appears in the licence panel, and in the message shown when a data (.xfc MB/GB), tags or hosted-AI allowance is used up, only for a licence in online mode while the licence service says top-ups are on sale. It then opens the owner’s page for that licence in your browser; afterwards choose **Refresh now** to see the new balance.

3.4 Subscription, fixed-term and earlier licences

- **Subscription (Monthly).** The headline reads “Paid through <date>”. The paid period renews automatically. When a renewal payment fails the licence enters a grace period (“payment overdue”); when that ends it becomes read-only for Exports, Advanced Export, Ask and External MCP, while browsing continues. Renew the subscription in the customer portal, then choose **Refresh now**.
- **Fixed term.** A fixed-term licence has a signed end date and nothing paid behind it. The panel names the plan with “(fixed term)”, says “Valid until <date> UTC”, and warns during the last 14 days: “After that date paid features switch off and your data stays readable.” There is no in-app renewal and no grace period; the app shows how to contact Bravura-AI (info@bravura-ai.com, or the address the licence service sends). The Buy section is hidden for a fixed term. Its hosted AI questions are one pool for the whole term and do not reset monthly.

- **Perpetual (a licence issued under earlier terms; not on sale in v0.5.0).** Named “(perpetual)”. A build released after the updates the licence covers shows “this version is not covered”, with the version to install or how to renew.

3.5 Offline behaviour

- **Standard licences need this computer online to activate and then at least once every 7 days.** The app refreshes the licence in the background when it can. If the service cannot be reached, the headline reads “working offline” and states until when the licence on this computer keeps working. After that the licence is read-only (section 3.1) until you connect and choose **Refresh now**.
- **Work offline.** The checkbox in the licence panel stops the app from contacting the licence service on purpose (the Connection reads “Offline (by choice)”). Buying and update checks are paused while it is on, and an unfinished activation continues when you turn it off. Hosted AI needs the connection, so Ask pauses while you are offline; on a licence that includes your own key or a local model, you can use one of those instead, and a Free installation has the hosted demo only.
- **Opening, charting and exporting data never needs a connection;** only the licence check does.
- **Air-gap is not available in v0.5.0.** The offline licence for computers that can never connect is not offered in this release: air-gap sales are off, and the controls that would switch a licence to offline stay hidden unless the licence service enables them. The Buy view says “For a computer that cannot connect, contact Bravura-AI before buying.” Earlier guides described a Site Air-Gap Bundle with a bundled local model and an ask_local_only licence flag; do not rely on that for v0.5.0.

3.6 Legacy licence files (.bravlic)

A licence file from v0.3 and v0.4 (.bravlic) can still be activated: when no portal licence is installed, the licence panel shows an **Activate license** tab with **Browse...** and **Activate** and, for a paid file, a **Remove license** button that reverts to the Free demo. The file’s own quotas, expiry, maintenance row and “Version coverage” row (shown when the file carries a version cap) behave as before, and an upgraded legacy licence keeps its export and BYOK rights.

One thing changed: **hosted AI is not available with a legacy licence file.** A hosted question on one is refused with “Bravura-AI hosted AI is not available with this licence file. Use your own AI provider key in Settings, or move to an online licence to use hosted AI.” The provider list hides “Bravura-AI hosted AI” for such a licence. A .bravlic also no longer carries a provider key that the app would use. The legacy “Top-up credits” tab (.bravcredit) is shown for legacy licences only.

Quick tip: the licence panel shows your machine ID. Copy it when you ask Bravura-AI for a legacy licence file or for support.

4. Loading historian data

DeltaV Continuous Historian writes data into .xhc binary archive files. PlantUnity Historian Explorer reads these files directly. There is no intermediate database step.

1. In the toolbar at the top of the main window, click **Browse...** next to the folder field. A native Windows folder picker opens (you can also type a folder, or pick one of the recently loaded folders from the arrow).
2. Pick the folder that contains your `.xfc` files. The scan is one level deep: every `.xfc` directly inside the folder you pick is loaded, and files in subfolders are not.
3. Click **Load**. The sidecar parses every `.xfc` file in the folder and merges everything into the in-memory historian store.

[Figure to recapture at the release VM proof: a loaded dataset, header chips showing tags, files and samples, and the tag list]

When loading completes, the header shows the tag count, the file count and the sample count of the loaded data. If a file fails to parse (corrupted, truncated, or an unsupported `.xfc` revision), the error appears with the filename and reason; the rest of the dataset still loads.

Quick tip: keep your `.xfc` exports in a single folder per dataset. The app remembers recent folders.

5. Tags browser

The **Tags** tab is the main entry point for exploring loaded data. The left pane shows the tag list with three filters across the top:

- **Pattern:** glob-style match against the tag name (for example, `*FIC*`, `2-FT-*`, or `101-???-003/PID1/OUT.CV`).
- **Area:** the area derived from the tag names (the segment before the first dash).
- **Category:** every classification the engine recognises (Analog Input, PID Controller, Discrete, and others).

[Figure to recapture at the release VM proof: the Tags tab with a pattern filter set and the match count]

Click a tag to open its detail panel. It shows:

- **Metadata:** area, instrument type, parameter, category, units, sample count, total time span, and min / max / mean (time-weighted for analog tags, duty-cycle for discrete tags).
- **Files containing this tag:** a table of every `.xfc` file that contains the tag, with per-file sample count and time range.
- **Trend chart:** an interactive chart of the tag's samples, with the resample mode (raw, auto, linear, step / LOCF, nearest, or time-weighted average) selectable above the chart.

[Figure to recapture at the release VM proof: the tag detail panel with metadata, trend chart, overview brush and the files table]

Chart zoom and overview brush. Drag-select horizontally on the main chart to zoom the X axis, or use the mouse wheel. A small **overview chart** below the main chart shows the whole series with the current zoom window highlighted: drag the highlight to pan, drag its edges to resize, or drag empty area to draw a new window. Double-click the main

chart, or click **Reset zoom**, to restore the full range. A **visible-range summary strip** between the two charts reports the visible window's point count, min / max / mean and time span.

[Figure to recapture at the release VM proof: a tag zoomed into a single upset with the overview brush and the summary strip]

Display time zone. XFC archives store timestamps in UTC. The header includes a searchable **time-zone picker** (type to search across Local, UTC and every IANA zone the OS knows). When you change the zone, chart axis labels and every metadata timestamp re-render. The selection persists across launches per workstation.

[Figure to recapture at the release VM proof: the time-zone picker open in the header]

*Quick tip: the **Ask about this tag** button in the tag-detail header opens the Ask panel pre-seeded with the current tag, time range and time zone. See section 8.*

6. Files browser

The **Files** tab mirrors the Tags tab but pivots on the .xfc files. The left pane lists every loaded file with its filename, file size, total sample count, tag count and first / last timestamp.

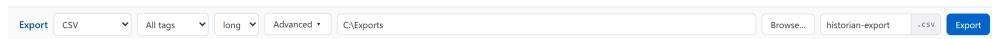
[Figure to recapture at the release VM proof: the Files tab with one .xfc archive selected and its per-tag table]

Click a file to drill into its contents: file metadata, and a table of every tag the file contains with per-tag sample count, time range within this file and min / max / mean. Clicking a row opens the tag's full detail panel, scoped to the file you came from. **Ask about this file** opens the Ask panel pre-seeded with the file context.

Quick tip: the per-file sample count and time range are the fastest way to spot a truncated or duplicated export before you chart anything.

7. Exporting data

The **Export bar**, the row below the folder toolbar, drives every export. It always exposes the same four controls.



Export bar showing the basic CSV export configuration

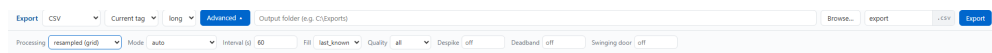
1. **Format:** CSV, Excel (.xlsx), or SQLite (HIST). The file extension follows the format selector automatically. A Free demo can export CSV only.
2. **Scope:** All tags, Current tag, or Current file.
3. **Output folder:** click **Browse...** to open a native folder picker. If the folder is empty when you click **Export**, the picker opens automatically.
4. **File name:** the base name (no extension).

Click **Export**. A non-blocking progress bar and an “Exporting...” message run while the export executes, and the rest of the UI stays usable. When the export finishes, the bar shows the output path and the rows written.

Format-specific notes:

- **CSV: long** layout (one row per tag-timestamp pair: tag, timestamp, value, quality) or **wide** layout (timestamp column plus one column per tag).
- **Excel: tag per sheet** (a Metadata sheet is always included) or **all tags in one sheet**. Excel’s row cap per sheet is handled automatically: data beyond it spills into additional sheets with a warning.
- **SQLite (HIST):** a database whose schema mirrors PlantUnity HIST: tables Source, Tag, Sample, with indexes on (TagID, TimestampUtc).

Advanced Export. Click **Advanced** to open the resampling and filter panel: linear, step (LOCF / previous), nearest, time-weighted average, min/max/count and auto, plus boundary fill, quality filtering and noise filters (despike, deadband, swinging-door). Whether Advanced Export is available depends on your plan; when it is not, the app says “Advanced Export” is not part of the licence.



The export bar with the Advanced panel open: processing set to resampled (grid), mode auto, a 60-second interval, last_known boundary fill, and the quality and noise filters.

7.1 Data allowances

The allowance is shown in the licence panel in MB, or GB when the number is a whole number of gigabytes (1 MB is 1 048 576 bytes, 1 GB is 1024 MB; for example “100 MB”, “1,536 MB” and “5 GB”, never “1.5 GB”).

Which licences renew every month. The **Pro monthly subscription** (the plan on sale) has a monthly period for .xfc history data and tags: they start again each month. Its monthly grant is 10,240 MB (10 GB) of .xfc history data, 20,000 tags and 500 hosted AI questions. A **Free** and a **fixed-term** licence have an .xfc history data and tags pool that does **not** renew: what you export counts against it for as long as the licence lasts, and nothing is granted again. The sidecar’s own rule says the same: “the current month of a subscription, one period for life for any other licence (the Free tier among them)” for the .xfc data, and, for a licence with the portal, “True when the file allowance restarts each month (the rule of _roll): a subscription term.” A fixed term’s AI questions are likewise “ONE non-renewing pool”. The sentences below that say “per month” or “monthly period” about .xfc history data and tags are the app’s wording for a subscription; read them as “for the whole licence” on a Free or fixed-term licence.

Earlier licences. A perpetual licence issued under earlier terms (not on sale in v0.5.0) behaves like the non-renewing case for .xfc history data and tags, while its hosted AI allowance does roll monthly while maintenance is active. An annual subscription issued earlier is still a subscription and shows the same panel rows.

- **.xfc history data.** The panel reads, for example, “.xfc history data: 1,536 MB used of 10 GB” and “Remaining .xfc history data: ...”. The rule, in the app’s words: “.xfc files are the history archive files written by the DeltaV Continuous Historian. Each .xfc file counts once per monthly period, by its content, when you first export it in that period; exporting it again in the same period is free, and in a new period it counts

again. Opening and charting files is always free.” On a subscription “a new period” is the next month. On a Free or fixed-term licence (or an earlier perpetual one) there is only one period, so a file you exported once is free to export again and a new file always counts against what is left.

- **Tags.** The panel shows “Tags: <used> used of <cap>” and “Remaining tags: ...”. On a subscription these restart each month. Only newly unlocked tags count against it in each monthly period; re-exporting something already unlocked is free. On a Free or fixed-term licence (or an earlier perpetual one) the tag pool is for the whole licence and does not renew.
- **Free demo.** “Up to 100 MB of .xfc history data” and the MB used; 10 tags. Neither renews.
- **AI questions.** One AI question is one question you ask Ask Historian, however many steps the answer takes. The row reads “AI questions available now” for a subscription (monthly allowance plus any prepaid questions; also for an earlier perpetual licence) and “AI questions” for a fixed term.
- **Top-up packs** are not on sale at launch; a pack is listed only when one was bought (“<amount> left”).
- **When an allowance is used up**, or one export is larger than what is left, the export is refused whole and nothing is counted: “This export needs <X> of .xfc history data, but only <Y> of your <Z> allowance is left, so nothing was exported and nothing was counted. A data pack or an upgrade adds more.” or “Your .xfc history data allowance is used up (<used> of <cap>), so nothing was exported and nothing was counted. A data pack or an upgrade adds more.” (These are the app’s fixed words; data packs and upgrades are not on sale at launch, so on a Pro subscription the way forward is the next monthly period, or contacting Bravura-AI.)

[Figure to recapture at the release VM proof: the licence panel of an active paid licence with the .xfc history data, tags and AI question rows]

Quick tip: the SQLite HIST export is the cleanest path into a downstream analytics pipeline. The (SourceID, TagID, TimestampUtc, Value, Quality) shape drops straight into Power BI, Grafana via the SQLite plugin, or a pandas notebook.

8. Ask Historian

Ask Historian is the chat layer over your loaded .xfc data. Open it with the **Ask** button in the toolbar, or with **Ask about this tag** and **Ask about this file** in the detail panels, which open it with the chat input pre-seeded with the selected context.

[Figure to recapture at the release VM proof: the Ask panel in its empty state, with the tier label and the hosted-left count]

Asking a question. Type a question in the chat input at the bottom of the Ask panel, for example:

- “What was the maximum OUT.CV of 100-FIC-102 in the last month?”
- “Which tags had the biggest spikes yesterday?”
- “Compare PV against SP on 2-FIC-2001 for the visible chart window.”

Press Enter or click **Send**. The assistant streams its answer. Internally the model calls one or more of the 12 read-only tools (`list_tags`, `get_tag_info`, `get_tag_data`, `resample_tag`, `compare_tags`, `get_tag_statistics`, `find_threshold_events`,

detect_changes, list_sources, get_chart_context, set_chart, propose_export). Each tool call appears as a collapsible card inline with the streaming text.

Hosted AI must be turned on first. The first time you choose **Bravura-AI hosted AI** and send a question, the app shows the disclosure and an **Enable hosted AI** button. The disclosure says that when you enable hosted AI your questions, the earlier messages in the chat and the results of the tools the assistant uses (which can include tag names, time ranges, data samples, file names and error messages) are sent through Bravura-AI's service to Anthropic to generate an answer; that Bravura-AI's service does not keep the text of your questions or answers, only usage counts and a one-way fingerprint of each request; that Anthropic keeps requests and responses under its commercial terms; and that your chat history is saved on this computer. **Cancel** leaves hosted AI off and sends nothing; your own key and local models need no such step. The settings offer **Turn off hosted AI** at any time. Until you enable it, a hosted question is refused with "Hosted AI is off." and the way to turn it on. The wording is a draft that counsel has not approved yet; the app reads it from one place, so the screen always shows the current text.

[Figure to recapture at the release VM proof: the Enable hosted AI step with the disclosure text, Enable hosted AI and Cancel]

A line under the chat says where your questions go. For hosted AI it is the disclosure above. For your own key it reads "Questions are sent directly to <provider> with your key; Bravura-AI does not receive them." For a local model on this computer it reads "Your questions stay on this computer." If the Ollama or LM Studio address you set points at another computer, the line says so instead: "Questions are sent over the network to the model server at <host>; Bravura-AI does not receive them."

The hosted model is not named. Every screen says "Bravura-AI hosted AI", in the provider list, the settings and the "Sent to ..." line under an answer. Earlier guides named a model there. The service chooses the model; the legal disclosure names the provider, Anthropic, and no model.

Citations. Every numeric answer ends with one or more **citation chips** that name the source .xfc file and the timestamp range the numbers were drawn from. Click one to jump to the file in the Files tab.

Privacy footer. Every assistant message ends with a footer that spells out exactly what left the workstation for that turn. It names where the question went ("Bravura-AI hosted AI" or the model you picked), counts the tag names, time ranges and spike windows that travelled, and states the sample situation in one of three sentences:

[i] Sent to Bravura-AI hosted AI: 6 tag names, 5 time ranges.
No raw samples sent. View payload >

[i] Sent to Bravura-AI hosted AI: 4 tag names, 1 time range.
796 sample points sent (up to 200 per chart). View payload >

[i] Sent to Bravura-AI hosted AI: 1 tag name, 1 time range.
1440 sample points sent. View payload >

- **No raw samples sent.** No sample point travelled on this turn: only tag names, time ranges and server-computed summary statistics went to the model.
- **N sample points sent (up to 200 per chart).** Sample points travelled, and every tool that produced them is one of the chart tools the sidecar caps: `get_tag_data` and `compare_tags` each downsample to at most 200 points **per call**. N is the true total

across the turn, so a question that made the model call `get_tag_data` four times legitimately reports a number in the high hundreds.

- **N sample points sent.** At least one of them came from a tool with no server-side cap: `resample_tag` returns the grid it was asked for.

The composer hint under the chat input reads: “Sends tag names, time ranges, summary statistics and, when the analysis needs them, sample points. The note under each answer shows what was sent.” Click **View payload** to expand the full payload that travelled to the model for that turn.

[Figure to recapture at the release VM proof: an answer with the privacy footer, “Sent to Bravura-AI hosted AI”]

Hosted counters in the Ask header. On the Free demo the header of the Ask panel reads **N hosted left**. On a paid portal licence with hosted AI selected it reads **hosted AI**, and the licence panel shows the AI question allowance (section 7.1).

When a hosted question is refused or cut off, the app shows plain-language messages instead of technical text: for example “This conversation is too long for hosted AI. Start a new chat.” when the conversation exceeds the service’s size limit, “The answer was cut off” when the connection drops while an answer streams (the question and the partial answer are saved), and fixed messages for a used-up allowance, an ended licence, a licence that is not activated or released, and the service being unavailable. A question the model declined for safety reasons ends with a neutral message, and that question is not saved.

Sessions. The session list at the top of the Ask panel shows every chat session with titles derived from the first question; + starts a new chat and × deletes the current one (deletion is local, from `~/bravura-historian/chat.db`).

Audit log. Each session writes a JSONL audit log to `~/bravura-historian/audit/{session_id}.jsonl` capturing every turn. The **Audit** button in the Ask panel header packages the current session’s log plus a manifest into a ZIP for your QA team.

Quick tip: toggle the “Include current view” chip in the chat input and the next turn bundles your current tag selection, chart zoom window and display time zone, so questions like “what is happening in the window I’m looking at” just work.

9. AI provider settings

Provider settings live in the settings of the Ask panel and in the **AI provider** tab of the legacy licence panel.

[Figure to recapture at the release VM proof: the AI provider settings with the provider list, the hosted AI on/off control and the local model status]

The providers are: **Bravura-AI hosted AI**, **Anthropic (BYOK)**, **OpenAI (BYOK)**, **Google Gemini (BYOK)**, **xAI (BYOK)**, **DeepSeek (BYOK)**, **Mistral (BYOK)**, **OpenRouter (BYOK)** and **Local (Ollama)**.

- **Your own key (BYOK).** Paste your API key for one of the seven providers above. You pay the provider directly. Keys are encrypted at rest with Windows DPAPI (per-

user, machine-bound). The app never shows the key again after saving, only **configured** or **not configured**. On each request the key is sent to the sidecar for that single call; it never lands on disk in plaintext and never goes to a Bravura-AI server. The privacy line says so (section 8). **BYOK needs a paid licence whose plan includes it**; the Free demo permits the hosted provider only.

- **Bravura-AI hosted AI.** Zero key setup: it goes through Bravura-AI's AI service using your licence (or the Free demo's credential). You must enable it once (section 8). It is metered against the AI question allowance of your licence, or the demo's two questions. The licence panel shows what is left. The settings show that the hosted AI is managed by Bravura-AI and cannot be changed there.
- **Local model.** The app probes 127.0.0.1:11434 (Ollama) and 127.0.0.1:1234 (LM Studio) on demand; click **Probe again** to refresh. A running engine reads **up**; an engine that is not running reads **not detected**, in muted text, because on most workstations no local model server is installed. Questions stay on this computer when the model server is on this computer. Local models need a paid licence whose plan includes them.

Each provider has a model dropdown with a curated list; pick **Custom...** and paste an exact model id for anything not on the list.

Telemetry. There is none. Earlier builds had an opt-in usage-metrics toggle; it was removed in v0.5.0 together with its code paths.

Quick tip: if a plan or licence state does not allow a feature you tried (for example BYOK or Advanced Export), the app names the feature in its message rather than failing silently; the licence panel's headline shows the state.

10. External MCP

The installer ships a **bundled MCP server** in the sidecar. When your licence includes External MCP, external Model Context Protocol clients (Claude Desktop, Cursor, Cline and other MCP clients) can connect to the loaded .xhc data and call the same 12 tools the Ask panel uses. The MCP server lives inside the sidecar process, so the historian application must be running for it to accept connections.

- **Licence gating.** The server refuses external connections unless the licence includes External MCP (a Free demo does not). With an online licence the decision follows the licence on this computer; when it ends or goes read-only, External MCP is off ("Exports, Advanced Export, Ask and External MCP are off").
- **Connection information.** While the licence includes External MCP, the app writes a manifest at ~/.bravura-historian/mcp_external_manifest.json (host, port, token and the available tools) and a README beside it; it removes both when the licence no longer includes it. Point the client at http://<host>:<port>/mcp and pass the token in the X-MCP-Client-Auth header. The routes are POST /mcp/initialize, GET /mcp/tools and POST /mcp/tools/call.
- **Tokens.** In v0.5.0 the desktop window has no External MCP panel: the tokens a client needs are managed by the sidecar's own route, not through a screen of the app. The manifest carries the most recently minted token, or none when no client was registered. Revoke a client by removing its entry from ~/.bravura-historian/mcp_client_tokens.json.

Quick tip: if a client reports X-MCP-Client-Auth header missing, the client configuration does not include the token from the manifest.

11. Privacy posture

The privacy posture is enforced in the sidecar, not in the prompt, so a bug in the UI, the prompt or the model cannot leak more than the policy permits.

Defaults that always apply:

- **Tag names plus server-computed summary statistics** travel to the model. They are the output of `get_tag_info`, `get_tag_statistics`, `find_threshold_events` and `detect_changes`.
- **Raw sample arrays** are sent only when the analysis needs them. `get_tag_data` and `compare_tags` are capped at a **200-point downsample per call**; `resample_tag` returns the grid it was asked for and is not capped. Because a turn can make several capped calls, the total can exceed 200, which is why the footer reports the summed count.
- A **response allow-list** strips any field of a tool result that is not in the tool's declared output schema before the result travels to the model.
- **Hosted AI is opt-in** and shows its disclosure first (section 8). With your own key or a local model nothing goes to Bravura-AI.

Per-turn footer. See section 8: it states exactly what travelled, and **View payload** shows the same JSON the sidecar sent.

Audit log. Every session writes a JSONL audit log; each line is one event (`turn_start`, `user_message`, `tool_call`, `assistant_message`, `error`, `turn_end`), with a sha256 and a byte size on every payload. The log rolls over to a new segment at 50 MB. The **Audit** button exports a session as a ZIP plus a manifest.

Telemetry. None. The app and the sidecar contain no telemetry code path.

What reaches Bravura-AI's services. Licence checks and activation (the licence, this computer's identifier and installation id, the app version, and the licence agreement acceptance), purchases, the update check (the version you run and its answer), and, only when you enabled hosted AI and choose it, the question content as the disclosure describes.

Air-gap. Not available in v0.5.0 (section 3.5). Earlier guides described a licence flag `ask_local_only` and an air-gap banner; those are not part of v0.5.0.

Quick tip: for GxP work, keep Work offline on while you analyse, use a local model, and export the audit-log ZIP at the end of each session.

12. Troubleshooting and FAQ

Common issues

The main window stays on the splash for more than 30 seconds. Read the error message on the splash and follow its remediation hint. The recognised modes are port-bind failure (set BRAVURA_SIDEAR_PORT_RANGE to a wider range), missing Python runtime (re-run the installer), antivirus quarantine (whitelist the install directory and click **Retry**), bearer-token mismatch (click **Retry**) and unknown sidecar exit (click **Copy diagnostics** and send the clipboard contents to support).

“The licence agreement has not been accepted on this computer.” Accept the agreement in the overlay (section 2.3). Activation, purchases and the Free demo’s hosted questions need it.

“The licence agreement has been updated, and this version of the app does not include the new text.” Install the latest version (section 2.5). Local use is not affected.

The licence panel says “working offline” or “refresh needed”. The licence service has not been reached for a while. Connect and choose **Refresh now**. If Work offline is on, turn it off first.

Exports, Advanced Export, Ask and External MCP are off, but I can browse. The licence is read-only: the subscription ended, a renewal is overdue past the grace period, or the licence could not be refreshed in time. Renew in the customer portal if needed, then connect and choose **Refresh now**.

“Hosted AI is off.” Open the Ask panel settings and choose **Enable hosted AI**. With a paid licence you can also use your own key or a local model.

The Free demo shows “0 hosted left.” The demo’s two hosted questions are used up for this computer. Buy a licence (section 3.3).

“Provider key not configured” when asking a question. You chose a BYOK provider but did not paste a key. Open the settings, click the provider, paste the key and save. Retry the question.

A hosted question says the AI allowance is used up. Wait for the next monthly period (subscription), buy a top-up pack where **Buy top-up** is offered (top-ups are not on sale at launch), or use your own key or a local model.

“Your .xfc history data allowance is used up” or “This export needs ... of .xfc history data”. The export was refused whole and nothing was counted. On a subscription, wait for the next monthly period; on a Free or fixed-term licence (or an earlier perpetual one) the pool does not renew. In either case, export a smaller selection, or contact Bravura-AI (data packs and upgrades are not on sale at launch).

“This version is not covered.” This build was released after the end of what your licence covers. Install the version the message names, or renew.

“Check the clock.” This computer’s clock is behind a time the licence has already reached. Correct the date and time.

The privacy footer says a few hundred sample points were sent, but the cap is 200. Both are true: the cap is per call, and the footer reports the total across the turn. If the sentence omits the parenthetical, an uncapped tool (`resample_tag`) contributed. Click **View payload** to see which calls carried the points.

After upgrading, I have two entries in Apps & Features. Uninstall the older one. Your licence, chat history and counters live under `%USERPROFILE%\bravura-historian`, outside both install directories.

X-MCP-Client-Auth header missing from an external MCP client. The client configuration does not include the token from the manifest (section 10).

FAQ

Do I need a historian server or database to use this app? No. The app reads `.xfc` export files directly.

What does the Free demo include? Up to 100 MB of `.xfc` history data, 10 tags, CSV export, 2 hosted AI questions for life per computer, and 15-minute sessions (section 3.2).

How do I buy a licence? Choose **Buy licence** in the licence panel; the store page opens in your browser, where the plan on sale is Pro monthly (Site is by quote). After payment the app activates the licence, or you enter the activation key you received when you bought (section 3.3).

What happens if my subscription payment fails? The licence enters a grace period (“payment overdue”) and keeps working; when the grace period ends it becomes read-only for exports and Ask while browsing continues. Renew in the customer portal and choose **Refresh now**.

Does it work offline? Opening, charting and exporting `.xfc` data does not need a connection. A standard licence must be online to activate and then at least once every 7 days. A local model (Ollama or LM Studio) works without a connection. Air-gap licences are not available in v0.5.0 (section 3.5).

What can I export? CSV (long or wide), Excel (one sheet per tag or all in one), and SQLite (a Source / Tag / Sample schema that mirrors PlantUnity HIST), within the plan’s `.xfc` data allowance and format entitlements. The Free demo exports CSV only.

Do you store my Anthropic or OpenAI key? No. BYOK keys are encrypted at rest with Windows DPAPI (per-user, machine-bound) and sent only on the request that uses them. They never sit on a Bravura-AI server.

Is there a Bravura-AI key inside the app? No. v0.5.0 removed the bundled hosted key. Hosted AI goes through Bravura-AI’s service using your licence or the Free demo’s credential.

Which model does hosted AI use? The app names none: it says “Bravura-AI hosted AI”. The service chooses the model, and the disclosure names Anthropic as the provider.

Will my older licence file still work on v0.5.0? A legacy `.bravlic` keeps its export and BYOK rights; hosted AI is not available with it (section 3.6).

What is the privacy default for Ask Historian? Strict by default. Tag names, time ranges and server-computed summary statistics travel; sample points travel only when the analysis needs them, capped at 200 per call on the chart tools; hosted AI is off until you enable it; and the footer under every answer reports the exact number of sample points sent.

Can external tools like Claude Desktop or Cursor connect to the historian data? Yes, when your licence includes External MCP (section 10).

What OS do I need? Windows 10 or 11, 64-bit, with the WebView2 runtime.

Quick tip: if something is not working and the cause is not obvious, the licence panel's headline and the privacy footer on the most recent answer often hold the clue.

End of user guide. For licensing detail, see `LICENSING.md`. For build and packaging detail, see `BUILD.md`.