

XLReporter On-line Training

Course Lessons

Pre-requisites

- Creating a project
- Project explorer

The Project Explorer provides easy access to all the features of **XLReporter**. The interface consists of a menu ribbon and multiple panes for viewing project templates and status.
- Data connectors
- Template design
- Data placement

There are several ways in which data can be written to a report data, either directly or relative to a starting cell.
- Report names

Reports produced automatically can be distinguished by configuring a naming convention and deciding the folders where they will be stored. The names usually reflect the nature of the report e.g., Machine2_20Jan2017 and can be set at both the workbook and worksheet level e.g., daily sheets named after the day produced in a monthly workbook.
- Scheduler

Additional

- Implementing the power of workbook formulas, conditional formatting and data validation.

Report from Process Data

- Mobile report
- Daily values report – library
- Add additional columns
- Daily summary report – studio
- Add intermediate calculations
- Add a summary and chart
- Review register variables
- Daily event report
- Add a summary and chart
- Multiple event report
- Cycle report
- Add user comments

Additional

- Tank Volume Lookup
 - From the OPC server retrieve tank levels.
 - Use a lookup table to determine the volume of the tanks.
 - Export the calculated volumes back to the process.
 - High Speed Data Logging
 - Retrieve live process values in an array of 5 second blocks
 - Append the block down the worksheet
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- Recipe Loader
 - Excel workbook containing a worksheet for each possible batch type.
 - Each worksheet contains the parameters for the particular batch.
 - When the user triggers a bit a batch ID is read from the process.
 - XLReporter looks up the Batch ID and exports the parameters back to the process.
- Process Shipping Labels
 - XLReporter retrieves a live process snapshot when in a bit triggers.
 - Specific information like Customer, Company Name, Address and other parameters are written to a worksheet.
 - This worksheet is then sent to a label printer.
- State Regulatory and MOR reports
 - Each day the information required for the report is automatically retrieved. At the end of the Month the supervisor can review and sign off on the report before sending it to the government. If the format is done in a specific way a DATA sheet is added to write the data to. Then Excel equations link to the specific areas.

Report from Historians

- Daily values report – library
- Daily values report enhancement
- Daily summary report – studio
- Add intermediate calculations
- Add a summary and chart
- Review connector scope
- Daily process book
- On-demand summary report
- On-demand report – studio
- Data management
- Excel layout

Additional

- Advanced Daily Comparison Report
- Daily Report with Monthly Summary

Report from Database, Manual Data Entry

- Daily alarm report
- Alarm and history report
- Schedule and interactive alarms report
- Configure a form connector
- Daily chlorine and turbidity form
- Daily summary report

Publishing Reports

- Publish web reports
 - Enabling the web portal
 - Excel print settings
 - Setup PDF security
 - Publish PDF reports
 - Copying reports to a shared folder
 - Compressing reports
 - Email daily summary report
 - Sending SMS messages
 - Uploading reports to an FTP server
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- Email Report
 - Retrieve the last two hours of data based on an event in the process then calculate the Min and Max. Send a text message to an operator containing the values only and email the last two hours of raw data.

Additional

- Export to Database
 - Export to CSV
 - Range or custom string using Excel calculation.
 - Export to XML
 - Export back to PLC
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