

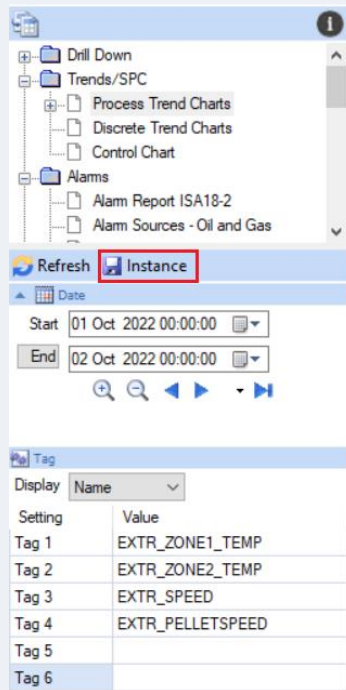
On Demand Reports with Repeated Settings

Overview

On Demand reports in XLReporter are highly flexible. Almost everything in the report can be set as a parameter that the user can specify at runtime. If you find that you are constantly using the same set(s) of parameters, the following highlights the options available in XLReporter to reduce the amount of repetitive actions you may need to do.

Instances

An instance is a named set of parameter values for an On Demand report. Instances are created in the **On Demand Reports** application when run on the machine where XLReporter is installed.



An instance is created by first specifying values for all the parameters required and then clicking the **Instance** button.

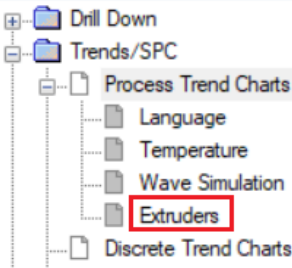
Save Instance ✕

Name

Description

Give the instance and name and (optionally) a description and the instance is saved. Multiple instances can be created for each template.

Once an instance is created, it is available from wherever reports can be generated on demand including the XLReporter web portal.



When the instance is selected, every parameter is filled in with the value stored in the instance.

To modify an instance, change the parameter values you desire then click the **Instance** button again to overwrite.

Date Panel

For values in the Date panel, rather than storing fixed dates, the overall duration specified is stored in the instance. When the instance is selected, the **Start** is calculated by subtracting the overall duration from the current time. The **End** is based on the current time.

Other Uses for Instances

Instances can be used as part of specifying a template for an alarm notification in WIN-911. This means that a single template can be set up multiple instances where each instance can pertain to information that may be needed to help determine why an alarm occurred.

Schedule

If you find you are constantly using the same parameters to produce a report for a shift/day/week/month, consider setting up a schedule to generate one or more reports automatically.

Report Names

Before setting up the schedule, first consider setting up **Report Names** for the template in the **Design Studio**.

Template	Folder	Report	Over
WORKBOOK			
Process Trend Charts	{Machine}	Daily Process {DD}{MMM}{YY}	No
WORKSHEET			
.			
Chart			
Chart_small			
Data			

The settings configured here define the names of the report workbooks (.xlsx file) and worksheets (tabs within the workbook) generated from the template. Report names can contain fixed text, XLReporter Name Types, and Variables set from the schedule.

For more information, see [Workbook and Worksheet Management](#).

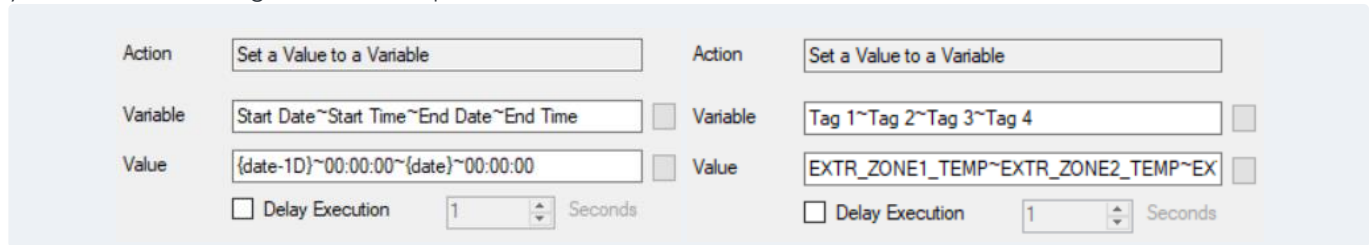
Scheduling Considerations

If data for the report is coming from a historian, the report should be scheduled to generate after all the data is available from the historian. This may mean that if the report is for the day, it may need to be scheduled at the beginning of the next day.

To learn more about this concept, see [Report Time and Schedule Time](#).

Setting Variables

If you wish to keep all the parameters set as variables so the report can still be flexible on demand, as part of the schedule, **Set a Value to a Variable** actions can be configured to set the variables used in the template to the values you want in order to generate the report.



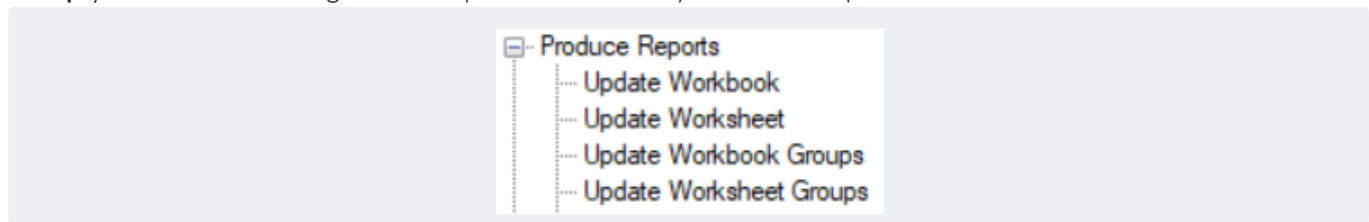
Up to 4 variables can be set with a single **Set** action with both the variables and values separated by ~.

Values can be specified as fixed text or can be set as XLReporter **Name Types** like `{date}` and `{time}`. It is recommended that for dates and times, the format should be the "universal format" `yyyy-MM-dd HH:mm:ss`.

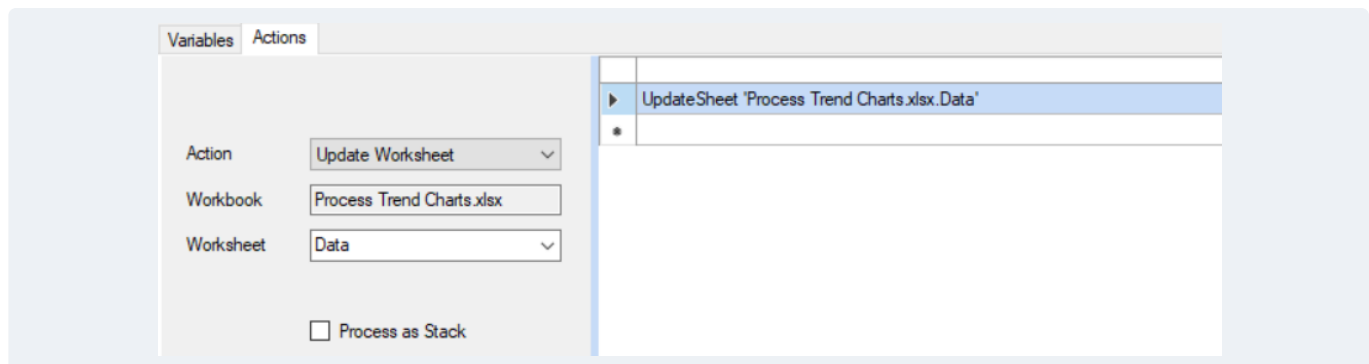
Configure all the variables and values to set for the report and schedule them to run when you want the report generated.

Update Actions

The update actions (**Update Workbook**, **Update Worksheet**, **Update Workbook Groups** and **Update Worksheet Groups**) can all be used to generate reports automatically from the template.



The action in the schedule is typically the same one used in On Demand.



To view which action(s) are used to generate the report, open the template in the **Design Studio**, select **On Demand Designer** and then select the **Actions** tab.

Configure these same action(s) in the schedule and set them to run when you want the report generated.

For more information, see [Report Actions](#).

Report Distribution

As part of scheduling, the report can be distributed automatically. Options include printing, copying to a file server and/or sending the report in an email.

For more information on the report distribution options available, see [Distributing Completed Reports](#).