

Publish Reports to Cloud Storage Services

Overview

Cloud Storage services offered by Microsoft, Google, and many others offer secure storage so files can be accessed anywhere and from any device.

This outlines how to publish **XLReporter** reports using cloud services like these.

Report Configuration

Most cloud services work by running a service on the local machine where **XLReporter** is installed. The services synchronize the contents of a local directory with one in the cloud, so there is no interference between the cloud platform and **XLReporter** when the two applications are operating on the same directories. In light of that, there are a few approaches that can be used for cloud publishing:

- The cloud syncing application can be directed at the report directories of the **XLReporter** project for workbooks, web, or PDF. This would synchronize every report in the project to the cloud.
- The application can be directed to the report subfolder for a particular report template to sync all the reports of a specific template to the cloud.
- A Schedule Action can be used to copy reports into a specific directory the cloud application is monitoring.

Report Folders

The report folders of the active XLReporter project are configured from the Project tab of Project Explorer.

🞒 XLReporter Pro	, , , ,	1.7.		1 2 12			
File Home	Data Project	Tools				Documentation	n 🔹 🕜 Help 🔹
General Security	Workbook PDF	Web	Hot Use ackup Acco	er Designer	Start/Stop		
	Settings						
Project XLR_Demo	General Security	Workbook F	Reports PDF	Reports Web F	Portal		
Report Temp Aerospac Alarm Pei Alarm Pei Alarm Alarm So Batch Cc Batch Cc Batch Cc ClP -Foc Cl	Folder: Default: Template [.xlsx Design ● Use≻	CLReporter Des	ign Studio			
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🖃 Variables			Workbook R		Evalu		
I (Furnace)		*	Web Report		Evalu		
Local			Advanced M	odules	Evalu	ation	~

Inside each of these report folders, separate subfolders are created for each report template.

Configure Cloud Synchronization

Microsoft One-Drive

OneDrive is built into the Windows operating system. Search or ask Cortana to open OneDrive, and sign into your OneDrive account.

Microsoft OneDrive	×
Your OneDrive folder	
Add files to your OneDrive folder so you can access them from other devices and stil have them on this PC.	
Your OneDrive folder is here C:\XLRprojects\XLR_Demo\Reports\OneDrive	
Change location Next	

Click Change Location. To sync all **XLReporter** reports automatically with OneDrive, select **Change Location** and browse to the project folder, e.g. C:\XLRprojects\XLR_Demo. Click **Next**.

In the next step the dialog Sync your OneDrive Files to this PC will appear. It is suggested that the Sync all files and folders in OneDrive is unchecked.

Continue with the setup by clicking Next until the Your OneDrive is ready for you appears.

Click **Open my OneDrive folder**. This creates the \OneDrive folder into the project directory.

Modify the Project

The OneDrive folder now has to be referenced in the XLReporter project. Open the **XLReporter Project Explorer**, select the **Project tab** and open **Workbooks**.

Settings				
General Sec	urity Workbook Reports	PDF Reports	Web Portal	
Folder Defaul	C:WLRprojectsWl	LR_Demo\OneD	rive\Reports	
Temp	ate Design			
			ОК	Cancel

Set the **Folder** to the \OneDrive folder in the project. Now, when reports are updated, they will be updated inside the OneDrive and synced to the cloud automatically. This process can be used with PDF and HTML report folders as well.

To customize the OneDrive file transfer, open the OneDrive by right-clicking the icon in the lower right of the Windows task bar.

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			en your OneDrive folder tings	
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To limit the sync to specific **Report Templates** in the report directory, select **More**, and then **Settings**. Select **Choose Folders**.

 Microsoft OneDrive 	×
Choose folders	
Choose what you want to be available in your "OneDrive" folder. These files will be available on-demand. Unselected folders will be hidden from File Explorer.	
□ Make all files available	
Or make these folders visible:	
✓ Files not in a folder (0.0 KB) > ✓ > ✓ > ✓ Personal Vault (0.0 KB) ✓ Personal Vault (0.0 KB) ✓ Pictures (0.0 KB) ✓ Pictures (0.0 KB) ✓ Files in "Reports" (0.0 KB) ✓ Jalarn Performance Dashboard (74.9 KB) ✓ Daily Events Log (8.6 KB)	
Location on your PC: C:\XLR.projects\XLR_Demo\OneDrive OK Cancel Selected: 8.6 KB	

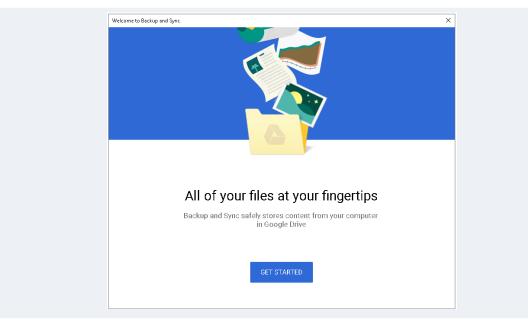
Within the **Reports** directory, disable the sync operation on the undesired subfolders by using the checkbox controls.

With files on the cloud, any client can view/modify their content from a desktop or mobile phone.

Google Drive

Google drive, like OneDrive, is also a cloud based for file sharing.

Install the application "Backup and Sync by Google", and sign into your Google account.



Select **Choose Folder**, and then select one of the project report folders, or specific template subfolders.

Choose folders to continuously	back up to Google Drive
Desktop 647 MB	
Documents 0 MB	
🔲 📰 Pictures OMB	
🔽 📙 Reports 2 MB	
C:\XLRproje	cts\XLR_Demo\Reports

Publishing Outside of the Project

If the OneDrive/Google Drive folder is outside of the project directory then use a **Schedule Action** to copy reports to it automatically.

Action Time Adjustment: 1	Schedule Condition — Time — Continuous — Daily — Weekly — Monthly — Event — XLR_DA — XLReporter	Time:	
Produce Reports Update Workbook Update Workbook Update Worksheet Update Worksheet Groups Update Worksheet Groups Update Action List Publish Reports Save Workbook to Web Pag Save Worksheet to Web Pa Save Worksheet to PDF Print Worksheet V		Action Time	Adjustment: 1 🚖 day(s) 🗸
	Produce Reports	Action	Save Workbook to PDF
Publish Reports Save Worksheet to PDF Print Worksheet ✓	Update Worksheet Update Workbook Groups	Workbook	PLC Summary xlsx
	Update Action List Update Action List Save Workbook to Web Pa Save Workbook to Web Pa Save Workbook to PDF Save Workbook to PDF Print Workbook Print Workbook	Target	

The following Actions use a Target parameter to specify the file path and file name of the published report.

- Save Workbook to HTML
- Save Worksheet to HTML
- Save Workbook to PDF
- Save Worksheet to PDF
- Move a Workbook

If the **Target** ends in a "\" then the file is created in the specified directory using the **Report Names** settings in the **Report Template**, e.g. *PLC Summary_2020_03_25.pdf*.