

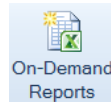
Deploying On-Demand Reports

Overview

On-Demand Reports are deployed on a local system or on a remote system. In both cases, the reports are generated based on specific report settings such as custom time frames or alarm thresholds.

Local

On the system where **XLReporter** is installed, the application is opened from the **Home** tab of the **Project Explorer** or from the **XLReporter** ribbon in Excel and selecting **Report Preview**.



The application can also be run from the command line with `C:\XLReporter\bin\XLRxReport.exe` enabling it to be opened from external applications and HMI displays.

Remote

On an Ultimate Edition, On Demand Reports can be accessed either by using the web team clients from any device with a web browser or by using the Windows team clients which provide the On-Demand Reports application accessible from the **Team Explorer**.

Security

If **User Security** is not enabled, then any user can use all the features.

If **User Security** is enabled then the user logged on must have the appropriate privileges.

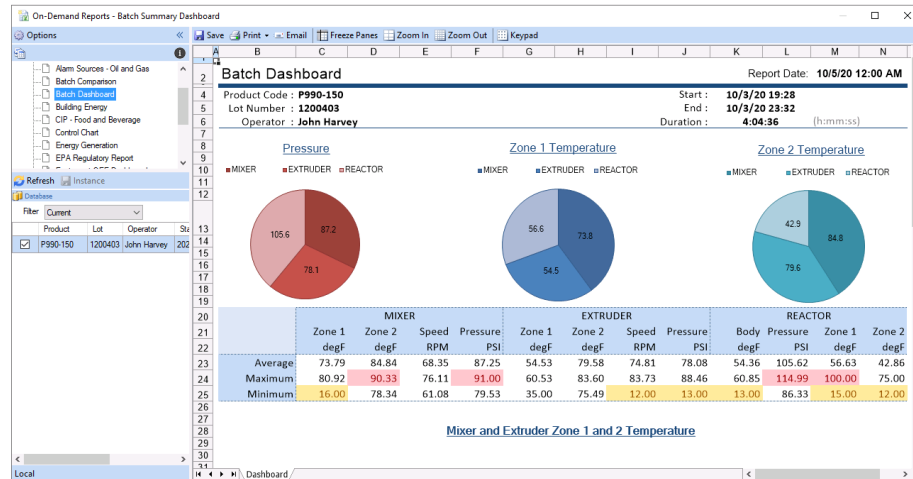
Template Security

If a template is designed with **Password Protection**, when **On-Demand Reports** is opened, the user is prompted for the password in order to refresh the template. If the user does not know the password, he/she cannot refresh any password protected template.

Once the password is specified it is retained as long as **On-Demand Reports** is opened so selecting any other password protected template does not require the password to be re-entered.

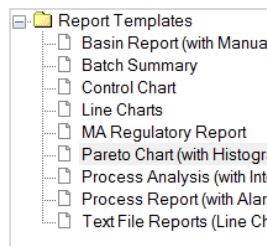
User Interface

The interface consists of a left view and a right view. The left view is where the templates and settings are selected and the right view shows the completed report.



Left View

The left view contains the templates assigned to the user logged on (if **User Security** is enabled) and a user entry panel(s) to determine the content of the display.



Toggle View

If categories are defined in the project, click this option to toggle between standard and category view for the list of report templates.

Collapse/Expand

These buttons expand and collapse the left panels.

Save

This option opens the **Save** dialog to save the report (see **Saving Reports**).

Print

This option opens the **Print** dialog to print the report (see **Printing Reports**).

Email

This option opens the email configurations defined in the project (see **Emailing Reports**).

Freeze Panes and Zoom

Freeze Panes adds and removes horizontal and vertical freeze panes at the location of the currently selected cell. This is a convenient way of keeping part of the report content fixed on the display while scrolling across or down.

Zoom options zooms into and out of the report. Note that once the zoom factor is changed it is applied to any other report you select.

Refresh

This option triggers an update of the report which in turn refreshes of the main display with the new report.

Instance

To save the current settings for a particular template, click **Instance** and enter a **Name** and **Description**. The instance **Name** appears as a branch to the template which, when selected, will reloads the settings for all the parameters.

For the **Date** panel, the settings saved when the instance is created are used to calculate an overall duration. When the instance is reloaded, the settings loaded are based on the calculated duration saved and the current date and time.

For example, if the instance is saved with a start date and time as January 1st, 2024 at midnight and an end date and time as January 3rd, 2024 at midnight (2 days), if this instance is reloaded on February 14th, 2024 at 9:00 AM, the start date and time is loaded as February 12th, 2024 at 9:00 AM and the end as February 14th, 2024 at 9:00 AM.

Instances can be used to generate reports that require parameters using the **XLReporter REST API**. The **Templates** method delivers each template/instance combination with the syntax:

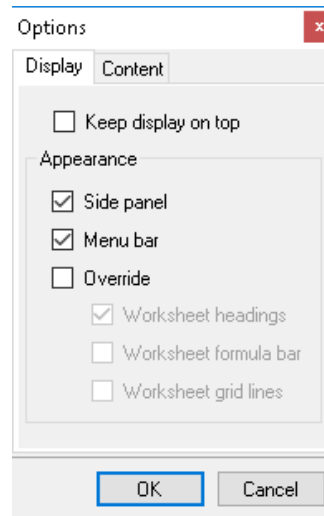
Template / Instance

To generate a report from the template with the instance using the **Report** method, the **template** setting should be specified with same *Template / Instance* syntax.

Options

Options are used to configure the **Display** and **Content** settings of **On Demand Reports**.

Display



Keep display on top

This option makes the application the topmost window. Use this setting if this is launched from an HMI display.

Appearance

Side Panel

If checked, the side panel is shown.

Menu Bar

If checked, the menu bar is shown.

Override

These settings override the settings saved in the workbook template.

Worksheet headings

This option displays headings (e.g., row numbers and column letters) on the right side of the application.

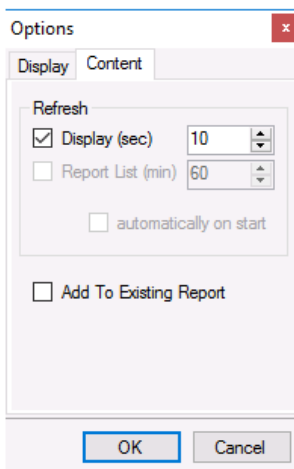
Worksheet formula bar

This option displays the formula bar above the worksheet.

Worksheet grid lines

This option displays gridlines in the worksheet.

Content



Refresh

Display (sec)

If enabled, when the report is refreshed it will continue to be refreshed automatically at the interval specified (in seconds).

Note that this functionality is not available from Windows Team Clients.

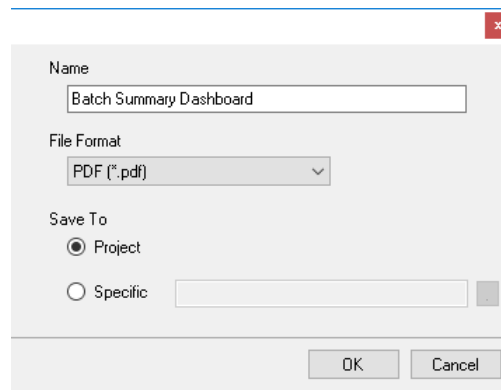
Add To Existing Report

When checked, if the report exists in the project it is opened and data is added to it. Otherwise, a new report is created from the template every time **Refresh** is clicked.

If **Refresh Display** is enabled and this is unchecked, the first refresh creates a new report template. Every automatic refresh afterwards adds to the existing report.

Saving Reports

To save the report displayed, click the **Save** pushbutton to open the **Save** dialog.



Name

The name of the report is saved as.

File Format

The file format to save the report to. This can be either workbook or PDF.

Save To

This defines where the report is saved.

Project

When **File Format** is set to *.xlsx* or *.xls*, the report is saved in the **Published** folder of the project (in the *Reports* folder). When **File Format** is set to *PDF*, the report is saved directly in the *PDF* folder.

If user security is enabled or if this is running from a Team Client, the report is saved in a subfolder of the **Published** folder named after the user.

Specific

The report is saved to the folder specified. A browse button [...] is provided to specify the folder. This option is only available for Excel workbook file formats.

Printing Reports

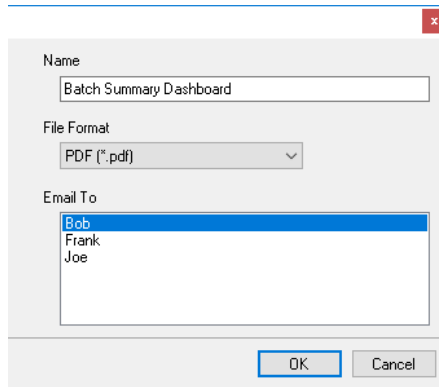
To print, click the **Print** pushbutton and select one of the following:

- **All Sheets**
All the visible sheets are printed
- **Active Sheet**
Only the displayed sheet is printed
- **Selection**
The area selected by highlighting a range of cells will be printed.

All the print settings applied to the template are used in the printout.

Emailing Reports

To email, click the **Email** pushbutton.



Enter a **Name** of the report attachment (defaulted to the template name) and the **File Format**, either *PDF* or *Excel (xls, xlsx)*. The email is sent to the selection in the **Email To** list which displays a list of email configurations in the project.

In the case of a **Team Client**, the configurations listed are those on the **Team Server** and when a selection is made, the email is sent from the Team Server.

Tag Browser

Templates can be configured with variables that represent tag names e.g., the tags in a history group.

Setting a variable to an actual tag name is performed by a tag browser which can either be direct or from a catalog.

Direct

In this mode, the tag browser shows the current list of names from the **Connector**.

Catalog

As part of a **Connector** definition, Item Catalog(s) can be configured which represent a sub-set of tag names. For example, a catalog may contain only the tags that represent temperatures.

In this mode, the tag browser displays the content of a catalog simplifying the user experience by not overwhelming them with all the tags (which could be in the thousands!).

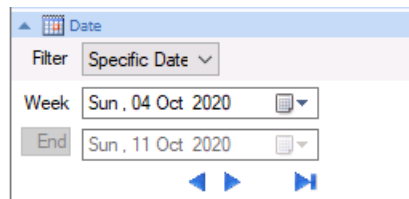
Panels

The user specifies values for variables from data input panels. For example, one template may require a Date panel (for the report time period) while another may require a Tag panel (for tag selection).

The panels are displayed in the Left view of the user interface. Each panel has a collapse button at the top left corner to hide it from view.

Date Interval

The **Date Interval** panel enables to user to specify a start date and having the corresponding end date calculated based on the start and the interval configured for the panel.



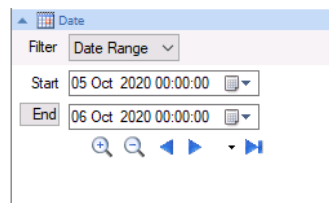
When a setting is made with the panel, it internally sets the values *Start Date*, *Start Time*, *End Date* and *End Time* which can be assigned to variables.

If **Add Period List** is set for the panel, a list of commonly used time periods is provided to select from. For details on each setting, see the **Date Calendar** section below.

Note the **Period** setting here is used to set the **Start Date** and **Start Time**. The **Interval** set for the panel determines the **End Date** and **End Time**. For example, if the panel is set up with the **Interval** as *Daily* in the designer and the **Period** is set to **Last Month** in the panel, the **Start Date** and **Start Time** are set to 1 month from the current time and the **End Date** and **End Time** are set to 1 day later. So, if this were run on *January 1st, 2020*, at midnight, the start would be *December 1st, 2019*, at midnight and the end would be *December 2nd 2019* at midnight.

Date Calendar

The **Date Calendar** panel enables the user to specify a time period.



When a setting is made with the panel, it internally sets the values *Start Date*, *Start Time*, *End Date* and *End Time* which can be assigned to template variables.

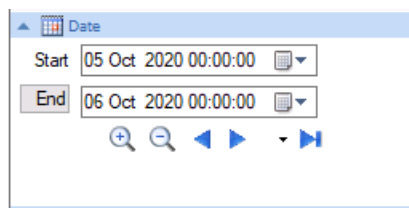
If **Add Period List** is set for the panel, a list of commonly used time periods is provided to select from. The following options are available:

- **Date Range**
The date range is specified using the controls provided. See the **Date Range** section below for details.
- **Last Day**
The time period spans the last day from the current date/time. When selected, this automatically triggers a **Refresh** of the template.
- **Last Week**
The time period spans the last week from the current date/time. When selected, this automatically triggers a **Refresh** of the template.

- **Last 2 Weeks**
The time period spans the last 2 weeks from the current date/time. When selected, this automatically triggers a **Refresh** of the template.
- **Last 3 Weeks**
The time period spans the last 3 weeks from the current date/time. When selected, this automatically triggers a **Refresh** of the template.
- **Last Month**
The time period spans the last month from the current date/time. When selected, this automatically triggers a **Refresh** of the template.
- **Last X Days**
The time period spans the last X days from the current date/time where days is specified. By default, this is set to 10 days. When selected, this automatically triggers a **Refresh** of the template.



Date Range



If the **Period** list is set to *Date Range* or **Add Period List** is not enabled, the panel appears as:



The **Start** can be entered manually or configured by using the date picker provided. When the start is edited, the end is automatically adjusted based on the start date and time plus the span. By default, the span is 1 day.

The **End** can be entered manually or configured using the date picker provided. In addition, the **End** can be toggled to **Span** by clicking the **End** button. The span value is in the form *[DD] hh:mm:ss*. It can be edited manually or selected from the drop-down list provided. When the span is edited, the end date and time is automatically adjusted.

The zoom control  decreases the span by the **Zoom In %** setting (50% by default). The zoom control  increases the span by the **Zoom Out %** setting (100% by default).

The pan buttons  adjust the start and end date based on the Pan % (50% by default) of the interval of the panel. To set the panel to the current time, click .

Tag

The **Tag** panel enables to select tags directly from a **Connector** or from a connector's **Catalog**.

Setting	Value
Tag 1	MIXER_ZONE1_TEMP
Tag 2	MIXER_ZONE2_TEMP
Tag 3	MIXER_SPEED
Tag 4	MIXER_RAMPRESSURE
Tag 5	EXTR_ZONE1_TEMP
Tag 6	EXTR_ZONE2_TEMP

When a setting is made with the panel, it sets the value to the template variable assigned to the selected row.

One or more tags may be selected when browsing for tags. If multiple tags are selected, subsequent tags are listed beneath the current selection. To remove a tag name, clear the **Value** column.

Parameter

The **Parameter** panel is used to select a wide range of value types.

Setting	Value
Start Date	10/23/2011
End Date	10/24/2011
Tag 1	MIXER_ZONE1_TEMP
Tag 2	MIXER_ZONE2_TEMP
Tag 3	MIXER_SPEED

When a setting is made with the panel, it sets the value to the template variable assigned to the selected row.

Input controls appear according to the panel configuration. For example, if a parameter is configured for a database query then when the **Value** column is clicked, the query is made, and a drop-down list of values is shown.

Database

The **Database** panel is used to select values from a record that results from a database group.

Filter	Product	Lot	Operator	StartDateTime	EndDateTime	
None	<input checked="" type="checkbox"/>	P990-150	1200404	Giles Smith	2020-10-01 01:32:00	2020-10-01 04:07:00
	<input type="checkbox"/>	P02369-80	1200362	Giles Smith	2020-10-01 07:08:15	2020-10-01 13:01:21
	<input type="checkbox"/>	P02369-80	1200363	John Harvey	2020-10-01 16:07:45	2020-10-01 21:15:32
	<input type="checkbox"/>	P72-0809	1210043	Giles Smith	2020-10-01 22:01:32	2020-10-01 23:56:11
	<input type="checkbox"/>	P72-0809	1210044	Giles Smith	2020-10-02 06:32:00	2020-10-02 10:08:05
	<input type="checkbox"/>	P50-30318	1200350	John Harvey	2020-10-02 13:17:11	2020-10-02 16:21:08
	<input type="checkbox"/>	P50-30318	1200351	John Harvey	2020-10-02 19:44:10	2020-10-02 23:12:08
	<input type="checkbox"/>	P50-30318	1200352	Giles Smith	2020-10-03 01:12:44	2020-10-03 04:45:00
	<input type="checkbox"/>	P990-150	1200401	Giles Smith	2020-10-03 09:08:07	2020-10-03 11:14:14
	<input type="checkbox"/>	P990-150	1200402	John Harvey	2020-10-03 13:26:10	2020-10-03 18:32:15
	<input type="checkbox"/>	P990-150	1200403	John Harvey	2020-10-03 19:28:03	2020-10-03 23:32:39

The **Filter** setting is provided to help get the list of values to select from. The following are always available:

- **None**
No filtering is applied. Every record returned from the database group or text file is displayed.
- **Record Count**
The limit of the number of rows returned. By default, this is set to *10*.
If used with a database group and the group itself has a limit (e.g., *SELECT TOP 20*), this filter has no effect.

If the **Use As Filter** setting is enabled in the panel, the following **Filter** options are also available:

- **Current**
The record set returned from the database group is filtered to only show the most recent record. When this option is selected the grid is automatically refreshed and a **Refresh** of the template is automatically triggered.
- **Previous**
The record set returned from the database group is filtered to only show the second most recent record. When this option is selected the grid is automatically refreshed and a **Refresh** of the template is automatically triggered.
- **Date Range**
A set of date controls are provided for the user to specify the time period over which to retrieve records. Once **Refresh** (...) is clicked, every record between the start and end is displayed.

- **Last Day**
The record set returned from the database group is filtered to only show records from the last day (based on current time). When this option is selected the grid is automatically refreshed.
- **Last Week**
The record set returned from the database group is filtered to only show records from the last week (based on current time). When this option is selected the grid is automatically refreshed.
- **Last 2 Weeks**
The record set returned from the database group is filtered to only show records from the last 2 weeks (based on current time). When this option is selected the grid is automatically refreshed.
- **Last 3 Weeks**
The record set returned from the database group is filtered to only show records from the last 3 weeks (based on current time). When this option is selected the grid is automatically refreshed.
- **Last Month**
The record set returned from the database group is filtered to only show records from the last month (based on current time). When this option is selected the grid is automatically refreshed.
- **Last X Days**
The record set returned from the database group is filtered to only show records from the last number of days specified until the current time. By default, this is set to 10. When this option is selected the grid is automatically refreshed.

If the database group has filtering configured for the timestamp column that filtering is replaced with the selected option so as to not cause any conflict.

By default, when a template using this panel is initially loaded, the panel is filtered to a **Record Count** of 10. This applies both to the **Windows** and **Web On Demand Reports**.

To **Refresh** the template for a single record in the grid do one of the following:

- Highlight the row and click **Refresh** above the panel.
- Double click the row.
- Check the row and click **Refresh** above the panel.

To **Refresh** the template for multiple records at one time check each desired row in the grid and click the **Refresh** button above the panel. Note, this functionality is not available is the **Single Selection** option is set for the panel.

The grid can be re-ordered based on any visible column by clicking the column header. The arrow in the column header indicates whether it is ordered ascending or descending.

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