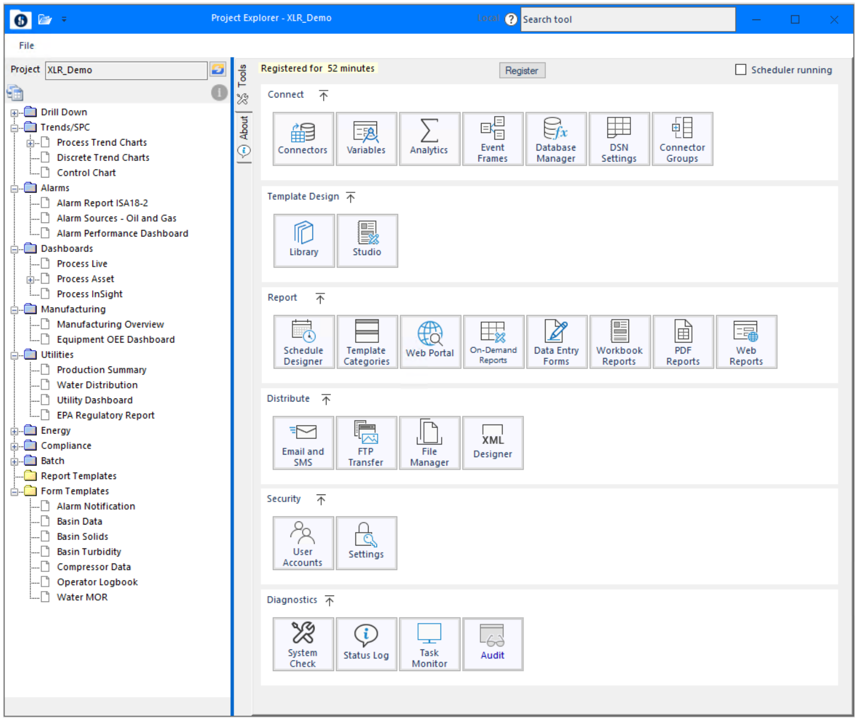
Project Explorer

Overview

The **Project Explorer** provides easy access to all the features of **XLReporter**. It is opened from the **Start** menu of Windows or from the shortcut added to the desktop during installation.

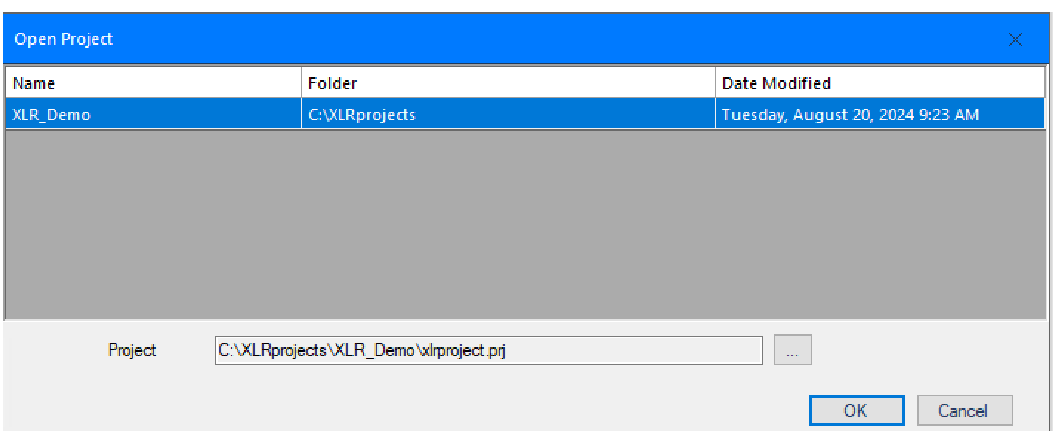
The interface consists of a menu ribbon and multiple panes for viewing project templates and status.



Please note that only one project can be active at one time so your entire reporting solution should be contained in a single project.

Open a Project

From the menu select **File, Open Project** to open an existing project. If the desired project does not appear in the list, it can be browsed to using the button for **Project**.



For the **Distributed** edition, after opening a project you are prompted to update the web portal. This requires administrator rights. If you cannot provide those rights, you may not be able to view reports in the web portal.

Backup a Project

To backup a project, select **File**, **Backup Project**. This creates a compressed copy of the project.

The backup is based on the **File Management** configuration *xlrProjectBackup* which can be modified in **Tools** tab, **Distribute**, **File Manager**. By default, this is set up to back up the project's **Input** and **Data** directories as well as any logs or reports generated within the last week.

Restore a Project

To restore a project that has been backed up using the **Backup Project** option, select **File, Restore Project**. Browse to the .zip file of the backed-up project and click **Open**. This can be very useful when transporting a project from one machine to another.

A project is restored to the original location it was backed up from. If a project exists in this location, the project is not restored, and an error message is shown. In order to restore an existing project on the system you must remove or rename the existing project folder.

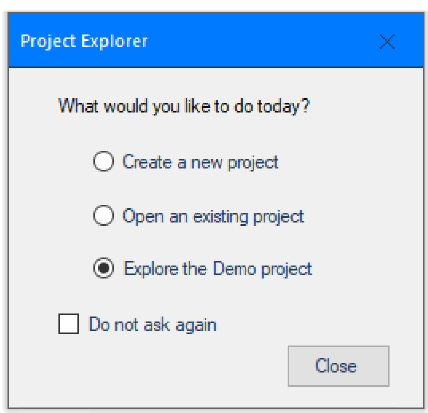
If the original location is not available on the system, the project is restored in the same folder structure on the drive where **XLReporter** is installed. Additionally, the drive specified for the Reports, PDF and Web folders are updated if they are also set for the drive that is not available.

This means that if the project was originally located in *D:\XLRprojects\My Project* and then brought to a new machine that does not have a *D* drive and where **XLReporter** is installed on the *C* drive, when restored, the project is restored to *C:\XLRprojects\My Project.*

Demo Project

By default, the **XLReporter** Demo project is loaded after installation. This project is provided to demonstrate many of the features of the product. It is recommended that you create your own project for your reporting solution rather than adding to this project.

If the demo project is the active project when the **Project Explorer** is opened, the following prompt is shown:

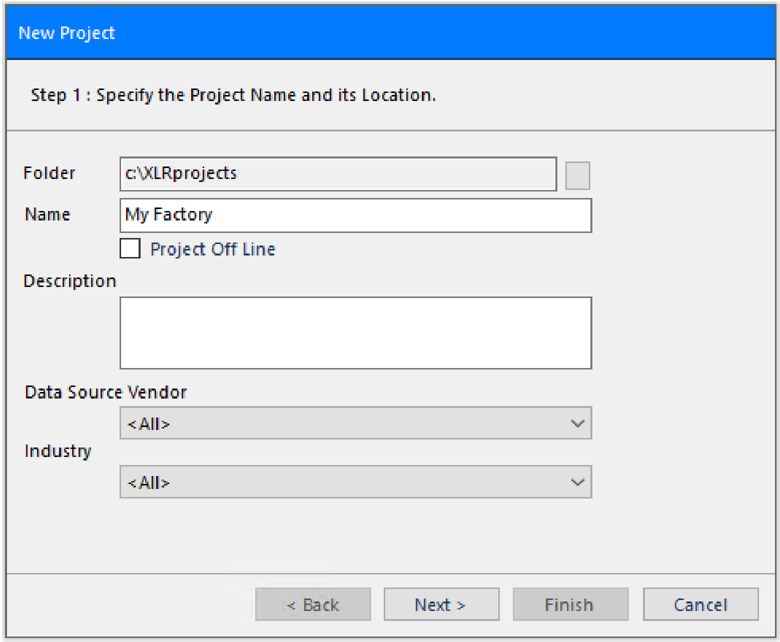


If this installation of **XLReporter** is to demonstrate the product, check the **Do not ask again** option so this dialog does not pop up every time you open the **Project Explorer**.

Project Wizard

The **Project Wizard** guides you step-by-step in creating a new project.

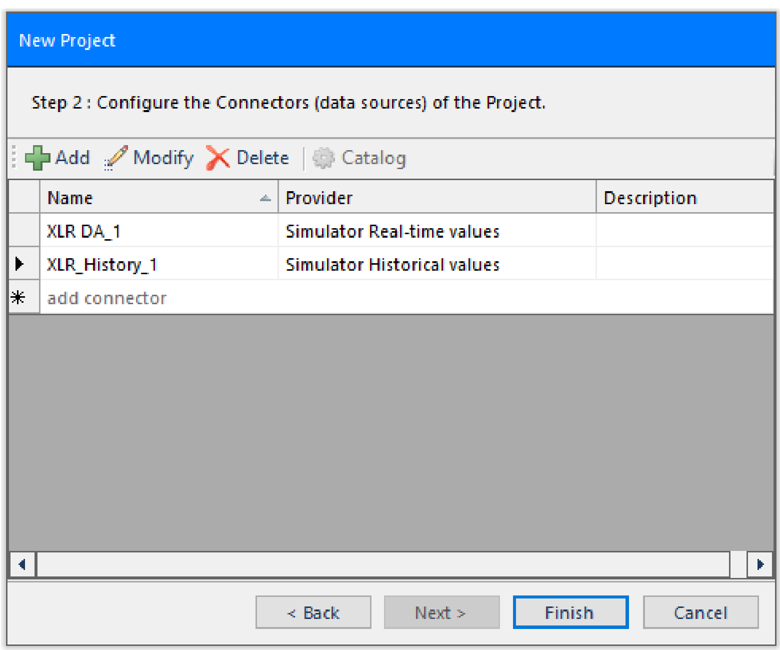
- **Step 1**



Specify the **Folder** where the project will be located then enter the **Project Name** and **Description**.

If desired, specify the **Data Source Vendor** and **Industry** settings for the project. If specified, these are used to restrict the items available when defining connectors or when defining templates using the template library.

- **Step 2**



Configure data connector(s) to the data sources used in the project.

For the **Distributed** edition, after creating the project you are prompted to update the web portal. This requires administrator rights. If you cannot provide those rights, you may not be able to view reports in the web portal.

Project Settings

Once the project is created, all the settings for the project can be accessed by selecting **File, Settings** and then the group of settings you wish to modify.

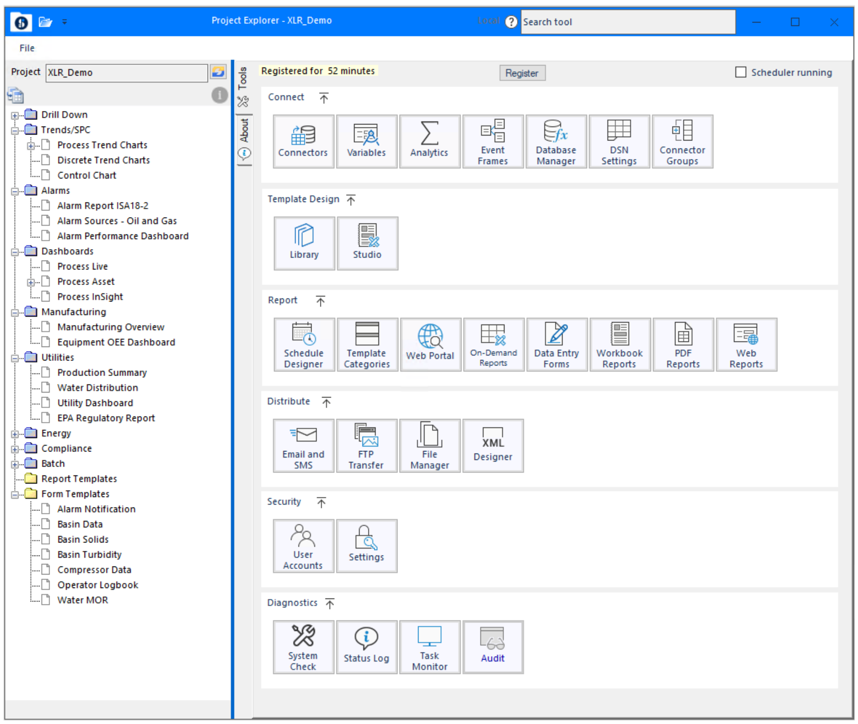
User Sign In/Out

If user security is enabled for the project, click **Sign In** in the **Project Explorer** title bar to sign in with a valid user account. Once signed in, the user name appears in the title bar. Click the user name to sign out.

File Archive

The **File Archive** is used to restore project files to earlier iterations when security is enabled. This is accessible by selecting **File, File Archive**.

Project Explorer Panels



Left Panel

The left panel of the **Project Explorer** shows a list of all the templates defined in the project. By selecting the  icon under the project name, the display toggles between the default view and the **Category** view if categories have been configured in the project.

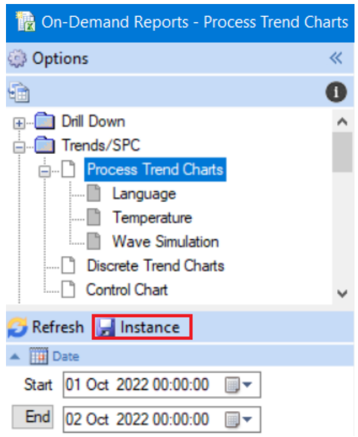
A template can be modified by double clicking the item or right clicking and selecting an option.

Template Instance

A **Template Instance** is a set of parameters and specified values that can be stored and then reloaded when generating a report on demand. Instances are displayed as branches under the template name.

Example: Suppose a report is required for three identical machines. One solution would be to create a template for one machine, duplicate and modify for the other two. This approach can lead to inconsistencies because any change in the template will have to be mirrored to the other two.
A better approach would be to create a master template for a machine and then to create three instances from the master template, sharing the same layout but containing their specific machine settings.

Template Instances are created from **On-Demand Reports**. In **On-Demand Reports** select the **Instance** button next to **Refresh.**



Right Panel

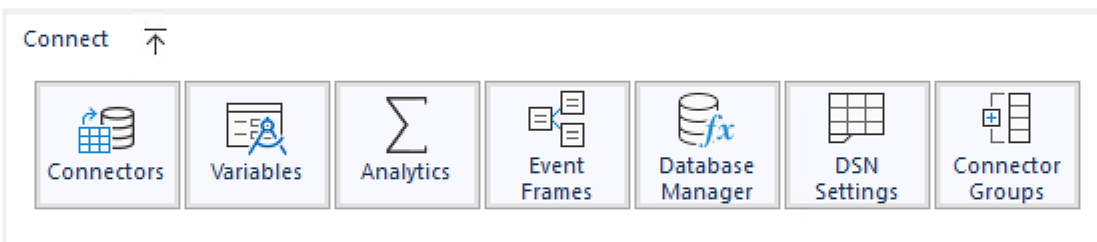
The right panel of the **Project Explorer** has two tabs: **Tools** and **About**. **Tools** provides access to all the **XLReporter** applications while **About** displays system information.

The **Tools** tab also has the current registration status as well as access to registration and the option to start/stop the Scheduler.

Project Explorer Tools

The **Tools** tab on the right side of the **Project Explorer** consists of six sections: **Connect**, **Template Design, Report**, **Distribute**, **Security**, and **Diagnostics**.

Connect



The **Connect** section provides access to all the applications to define connections to data sources for the project.

Connectors specify the data source definitions such as a PLC, Historian, or relational database.

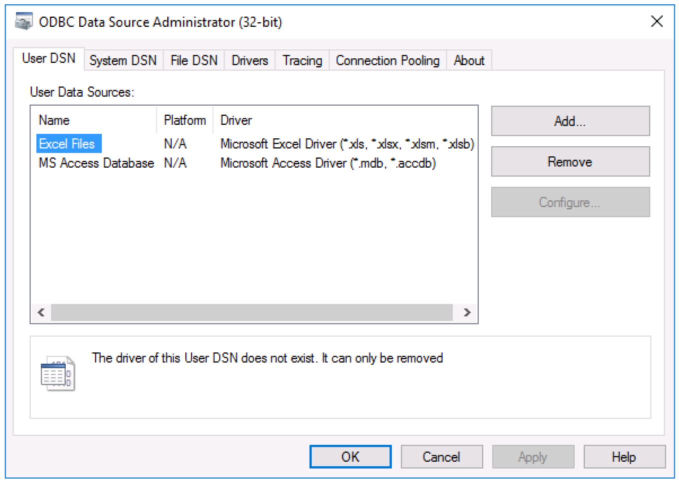
To add flexibility to templates, **Variables** can be used instead of a hardcoded setting. The values of the variables are assigned “outside” of the template e.g., from an on-demand report.

Analytics compute aggregated data and optionally save the results to a database for reporting.

Event Frames are used to record specific time frames based on process events for use in reports.

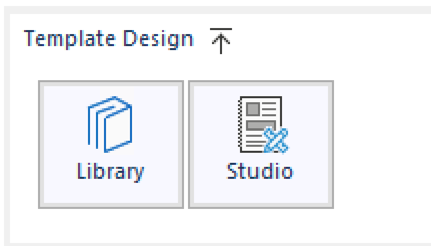
The **Database Manager** is used to maintain databases by doing such things as adding or removing tables and columns or previewing data stored in a table.

The **DSN Settings** is used to add and remove 32-bit ODBC database sources.



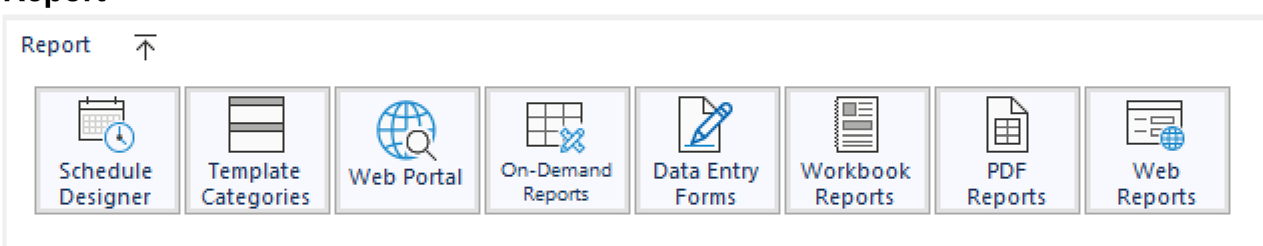
To check the integrity of the installation and the communication to the data sources use **System Check**, found in the **Diagnostics** section. For quick access to adding and removing **Data Groups,** use **Connector Groups**.

Template Design



Templates are created in two ways. One way is to select a pre-defined template from the **Template Library** and customize it for your application. The second is to create a new template in the **Template Studio**.

Report



Reports can be produced automatically and in the background by the **Scheduler**. Schedules are defined in the **Schedule Designer** to run “actions” on time or events.

Template Categories can be added to the project to help organize the report templates in applications like **On-Demand Reports** and the **Web Portal**. See **Template Categories** below for details.

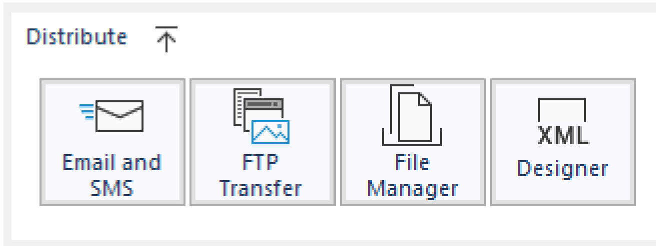
If the **Distributed** edition is installed, **Web Portal** opens the web browser and navigates to the web portal on local host.

Reports are produced from the template automatically by the **Scheduler** or on-demand with custom settings using **On-Demand Reports**.

Data Entry Forms are provided to allow operators to collect manual data and store the data to a backend database so the information can also be used for reporting e.g., operator rounds.

Secure viewers are provided to view reports in Excel, PDF, and HTML format. The viewers do not require pre-installed software (e.g., the Excel viewer does not require an installation of Excel) and allow managed edits to the report. These viewers are designed to be accessed from HMI displays.

Distribute



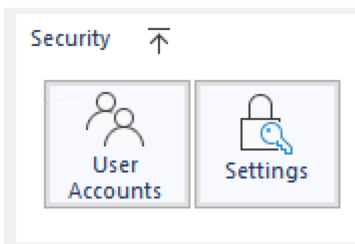
For reports that are emailed, either from the **Scheduler** or from **On-Demand Reports**, use **Email and SMS** to specify a mail server and user configurations.

For reports or files that are moved to/from an FTP server, use **FTP Transfer** to specify FTP Server configurations.

For reports or any other system files that need to be managed, such as moving and purging, use **File Manager** to configure file management actions.

To export the content of a report to a custom XML file use the **XML Designer**. This is applicable for the eDMR submission in W/WW Treatment.

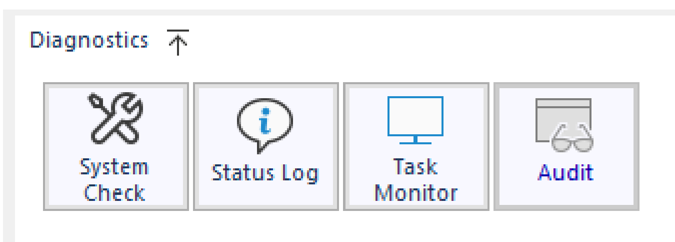
Security



When security is enabled, the user's capability is limited by their security privileges.

For details on Security **Settings**, see SETUP**, Implement Project Security** in the **Document Library**.

Diagnostics



The **Status Logs** are used to view any notifications or errors that are generated when actions are processed.

The **System Check** is used verify reading/writing to real-time data connectors. It is also used to perform a scan of the installation, and to repair any defects.

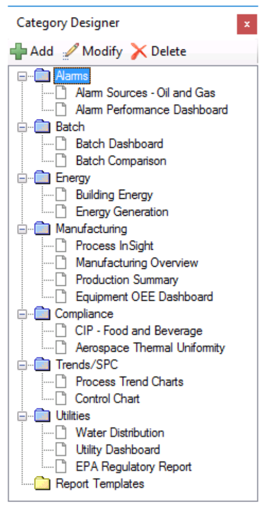
The **Task Monitor** is used to view the current state of the system including the active reporting queue.

The **Audit Logs** keep track of changes made to the project when the **Audit Trail** connector has been created (see SETUP, **Implement Project Security**).

Template Categories

A project can consist of many different report templates designed for specific areas of the plant or for different audiences. By default, when templates are listed in the Project Explorer, On-Demand Reports application and Web Portal, everyone is listed in alphabetical order.

Template Categories is available to help organize the report templates in the project so that the right people can find the reports that are important to them. To configure, from the **Project Explorer**, in the right-side **Tools** tab select **Report, Template Categories**.



Until a report template is assigned to a category, it appears under the **Report Templates** folder.

To add a new category, click the **Add** button and specify a name. Once a category is added, a template may be added to it by highlighting the template and dragging it to the category folder. Templates are listed in the order shown under the category. This order may be changed by dragging the template up or down under the category. Note that the order of templates cannot be changed under the **Report Templates** folder. For this folder templates are listed in alphabetical order.

To modify the name of an existing category, select the category folder and click the **Modify** button. Note that the **Report Templates** folder cannot be modified.

To delete a category, select the category folder and click the **Delete** button. Any template set to the deleted category is moved to the **Report Templates** folder.

Initial State

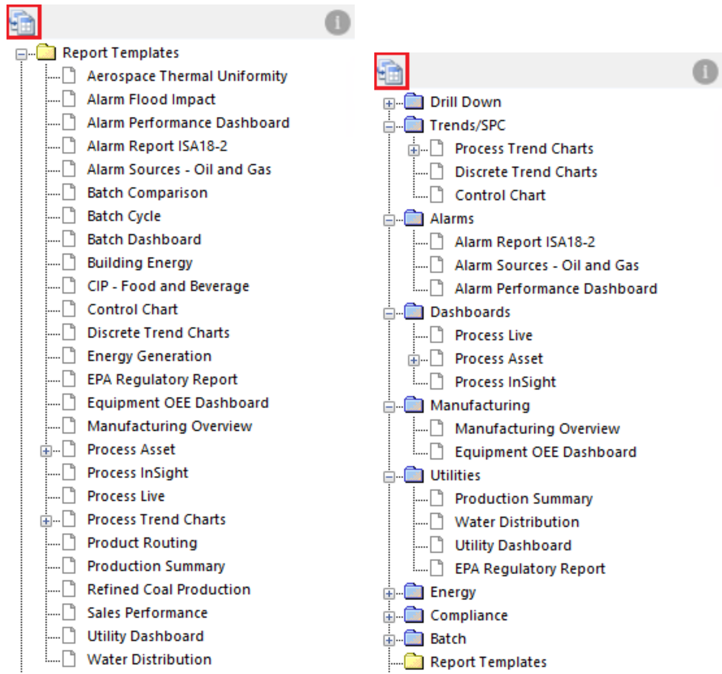
Consideration should be given to the expanded/collapsed state of a Category branch since this will be the initial state when presented to the user in a windows/web client.

Close the **Category Designer** to have the configured categories available in the project.

Usage

The template list in the left panel of the **Project Explorer** and the On-Demand reports application can be toggled between the standard list and the category list by clicking the toggle button in the upper left corner.

From a windows client:



From a web client: