Version 16.20 Release Notes

New Features

User Interfaces

Project Explorer

The Project Explorer is completely revamped. It is designed to follow the XLReporter theme of Connect, Design, Report and Publish.

The About section provides a more simplified view of the current system.

A search bar is provided to help find any application provided.

Template Studio

The Template Studio is completely revamped to follow the XLReporter theme of Connect, Design, Report and Publish.

The Report Names, Data Connect and Data Management dialogs have also been revamped to provide a more natural flow in template design.

A search bar is provided to help find any template design option provided.

The XLReporter Excel add-in is also updated to reflect the new icons introduced in the Design Studio.

Distributed Client Explorer

The Distributed Client Explorer is revamped to reflect the same look and feel as the Project Explorer.

Email and SMS

Email Server

The Email Server configuration is simplified to use a single server setting.

In addition to connecting directly to your Email SMTP server, you can now connect to the SmartSights Email Gateway or to the WIN-911 Email module. These options are provided to send email from an XLReporter installation not directly connected to the internet or for those using Office 365 for their email server as this provided a much more simple interface.

New Connectors

As part of creating a new project, you can now specify the vendor for your reporting data sources. When defining new connectors, the list of available connectors is now filtered to show only connectors from the vendor selected along with the general connectors (like OPC, OLE-DB, etc.) provided by XLReporter.

A show all option is available to turn off this filtering and see the entire list.

Template Library

Filtered List

As part of creating a new project, you can now specify the data source vendor as well as the industry you are using XLReporter for. When creating a new template from the library, the list of available templates is filtered based on this list to help narrow your choices.

A show all option is available to turn off this filtering and see the entire list.

Revamped Templates

Many of the library templates are revamped to look both simpler and cleaner. These changes are also seen in templates provided in the demo project.

New Connectors

Rockwell Automation

FactoryTalk View DataLogPro Historical Values

This connector is provided to retrieve history data from FactoryTalk View SE DataLogPro.

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New Features

REST API

Instances

For any On-Demand report, an instance can be created to save the settings for the parameters so that they can be reloaded in the future.

This functionality is now extended to the REST API. Any template that has one or more instances configured for it is delivered with the **Templates** method. The syntax is:

Template | Instance

This syntax can also be used for the template name in the **Report** method to generate a report from the **Template** using the parameter settings stored in the **Instance** specified.

Snippets

A snippet is an image snipped from a report. This is done using the **Data Management** functions **Data Export Range to Bitmap** and **Chart to Bitmap**.

The **TemplateSnippets** method is available in the REST API to deliver a list of snippets available for a template.

The **Snippet** method is available in the REST API to deliver the snippet image stream to the caller to display. Typically, this method is called after a **Report** method call to generate an updated version of the report itself as well as all the snippets configured.

This snippet functionality can be used in the **WIN-911 Control Center Dashboards** as a way of delivering up to date report information to users throughout the facility.

A set of library templates set up for snippets is available in the XLReporter Template Library.

Web Portal

To make the XLReporter Web Portal more accessible to users that are not on the production network, the front end of the web portal can be installed in the DMZ and configured to communicate with the backend installed with XLReporter on the production network.

This can be installed by downloading the installation from the XLReporter server and running it on the machine in the DMZ.

Alarm Management Advance Module

This module can now produce the key alarm metrics from the WIN-911 Alarm Notification system.

Installation

When installing the **Distributed Edition** of XLReporter, if Internet Information Services (IIS) is not enabled or does not have all the features required for XLReporter, installation attempts to enable/update IIS automatically.

New Connectors

Rockwell Automation

FactoryTalk Optix History values

This connector is provided to retrieve history data from FactoryTalk Optix logged to an ODBC compliant database.

Improvements and Issues Fixed

Connectors

Alarm Management Advanced Module

Increased timeout waiting for Alarm Management to complete to adhere to the Client Timeout setting in the connector rather than a fixed time of 120 seconds.

Rockwell Software FactoryTalk View SE History Connectors

Corrected issue where for both the **Data Agent Historian SE** and **Data Agent Data File(s)** connectors, when requesting raw data, if less than 3 records were returned an index error could occur.

OPC UA Real Time Server

Connection

An option to **Disable server certification checks** is available to proceed to connecting an OPC UA server where the information in the certificate may not match with what is expected based on the server endpoint. This option should be used with extreme caution.

Tag Browser

Updated to handle tag variables that are numeric, GUID or opaque. Previously these could not be selected, and data could not be retrieved.

OPC UA Historical values

Connection

An option to **Disable server certification checks** is available to proceed to connecting an OPC UA server where the information in the certificate may not match with what is expected based on the server endpoint. This option should be used with extreme caution.

Tag Browser

Updated to handle tag variables that are numeric, GUID or opaque. Previously these could not be selected, and data could not be retrieved.

When browsing for tags, if a variable is encountered that did not have the **Historizing** attribute set *true* it would not be listed even if it has children that could have the **Historizing** attribute set *true*.

OPC HDA Historical values

Corrected limitation when retrieving raw values from any OPC HDA server (such as Emerson's DeltaV Continuous Historian) to go beyond maximum return values as set in the server. This applies to both **Raw Values** history data groups as well as **Summary Values from XLReporter** history data groups where the **Retrieval Mode** is set to *Raw Values*.

GE iFIX Real-time values (local)

This connector is no longer available.

GE iFIX Historical values (classic)

This connector is no longer available.

AVEVA InTouch Real-time values (local)

This connector is no longer available.

Advanced Modules Basic Batch (ISA-88)

This connector is no longer available.

Tatsoft FactoryStudio Historical values

This connector is no longer available.

Tatsoft FactoryStudio Alarms

This connector is no longer available.

Elutions ControlMaestro Historical values

This connector is no longer available.

Project Explorer

Functionality to create and modify instances is removed. Instances can only be created from On-Demand Reports.

Schedule

Windows Service

Corrected issue where on some systems the service would not start up because the dependency service was not correctly configured in Windows.

Application

Corrected issue where if the **Schedule** is set up to run as an application either minimized or in the background, when started up using a shortcut, it would always start up normal no matter what the setting was.

Registration

Corrected issue where if you have a subscription license and change the time on the PC clock the license gets invalidated.

REST API

Templates Method

Method will no longer return an error if there are no templates in the project that can be delivered with the **Templates** method.

On Demand Reports

Instances

Date Panel

In previous versions, if the Date panel was configured for an instance, the values for the date/time were fixed so each time the instance was loaded, it would load the same date/time. Now, the date/time stored are used to determine a duration and when the instance is re-loaded, the start and end are calculated based on this duration 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.

This functionality is extended to the on demand reports from the web portal as well.

Template Library

Corrected issue where immediately after checking out a template from the template library for on demand, an **Instance** could not be saved.

Modify

An existing instance can now be modified and saved within On-Demand Reports.

Template Library

Corrected issue where if an On Demand template is checked out of the library and the name contains a space, that template was not selected by default in the On Demand Reports application.

Email and SMS

If an email address has multiple "." after the "@" an invalid email address error may occur. This validation is corrected to allow for email addresses with this type of syntax.

Web Portal

The video link was missing from the web portal installed.

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New Features

Subscription Licensing

XLReporter can now be licensed as a subscription as an alternative to a perpetual license.

Online Registration

XLReporter product registration can now be done through an online licensing portal. This can be done directly on the machine where XLReporter is installed or can be done from a separate machine with internet access.

The online licensing portal also allows for seamless license transfer as well.

REST API

A REST API is provided to get a list of available templates in the project and to generate reports from those templates in different formats. These formats include Excel workbook, PDF file, JSON, Bitmap, Text/CSV, and XML.

This can be used to not only generate complete reports but can also be used to deliver information from reports to other sources by using the JSON, Text/CSV, and/or XML option.

The Rest API requires the distributed edition to be installed and must have at least 1 client license available.

Schedule Events

An event condition option is available in the schedule to monitor the folder(s) configured in a **Text File Discrete** or **Text File Discrete (time series)** connector. When a file is created or modified in that folder, the action(s) configured for the condition is executed.

Data Management

New functions to **Data Management**:

- **Range to JSON**

  This function exports data from the report into JSON object(s) and saves to a file that can then be imported into data analysis packages like Microsoft Power BI.

- **Range to Bitmap**

  This function exports a range of cells from the report to a bitmap file. This range can contain text, data, formatting, formulas, charts, and any other object that can be put into a worksheet. This file can then be imported into a dashboard or other application that can display images.

- **Chart to Bitmap**

  This function is similar to **Range to Bitmap** except that it exports a specific chart object from the worksheet to the bitmap file.

- **From Image File**

  This function imports an image file into a report worksheet.

System Check

An option is available in System Check that displays all the currently logged in clients of a Distributed system. In addition, users can be logged out from this display.

Template Library

History Templates

Templates set up for historical connectors support the new **Text File Discrete (time series)** connector. See below for information about this connector.

Push Report Templates

A set of push report templates are provided in the library. These templates are designed to run On Demand without the user having to specify any parameters at all.

These templates can be used to push a report as part of a WIN-911 alarm notification.

New Connectors

Rockwell Automation

FactoryTalk Optix Real-time values (OPC UA)

This connector is provided to retrieve live data from FactoryTalk Optix via the OPC UA server.

Database (time series) Historical values (narrow time array)

This connector is designed to retrieve historical data where each row of data represents a unit of time and each column represents a smaller unit of time for a specific tag. For example, each row may represent an hour and each column a value for each minute of that hour.

Text File Discrete (time series)

This connector is designed to work with discrete text files (e.g., text files generated at the end of a cycle or batch) that contain a timestamp for every record. Using this connector, summary calculations can be derived over the duration of the file, e.g., 5 minute averages between the start and end of the file.

Improvements and Issues Fixed

PDF Report Viewer

- No longer requires Adobe Reader installation.

Web Report Viewer

- Uses the new Microsoft Edge Web Browser control that can display more modern web pages.

Documentation Library

- Selected document appears in same application, no longer launches web browser or Adobe Reader (or whatever the default PDF application is on the system).

Data Management

- For Data Export **Range to Text** and **Range to XML** functions, if no file name is specified the default name is the name of the report (or template if run on demand).

Data Connectors

Rockwell Automation FactoryTalk View Data Agent Historical Data

- Corrected issue where if a template contains two connections to two different FactoryTalk View Data Agent history data connectors, only the first connection returns data.

Rockwell Automation FactoryTalk View Data Agent Data File(s)

- When requesting raw values from this connector, the first 2 values returned were duplicate values with the same timestamp down to the second. This has been corrected to only return one of the two values.

Inductive Automation Ignition Real-time values

- Updated connector to automatically append */discovery* to the discovery server URL in order to properly connect to the Ignition OPC UA server.

Database (time series) Historical values (narrow)

- Support for tags in a separate table.

Item Catalogs

- Corrected issue where the tag browser for catalogs could not handle more than 32,000 items.

Report Workbook Viewer

- Corrected issue where on some systems, when trying to save a workbook to the local system an error would show as "Access to the path 'C:\Windows\System32\Book 1' is denied".

Design Studio

Report Names

- Updated to prevent using semicolon, single quote, or period in the **Target Workbook** or **Worksheet** names.

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