

Template Library

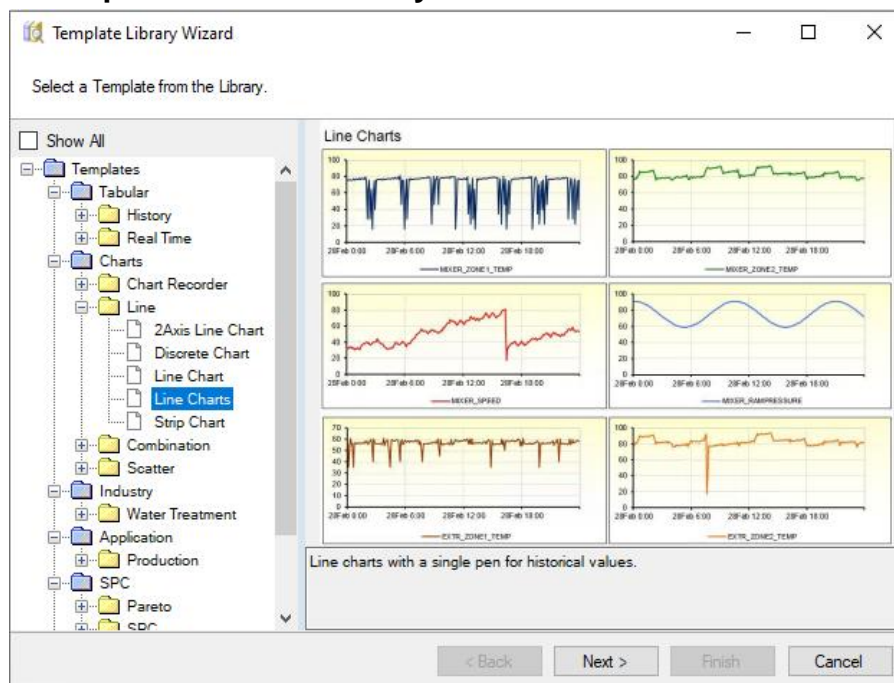
Overview

The **Template Library** is used to create fully report templates in a few easy steps.

The library is accessible from the **Project Explorer** on the right-side **Tools** tab in the **Template Design** section by clicking on **Library**.

Template Library Wizard

Select a Template from the Library



The available library templates listed is based on the connectors configured in the current project. For example, if the project only contains a real time data connector, the library templates listed are those that only require a real time connector.

In addition, the list of library templates is filtered based on the **Data Source Vendor** and **Industry** set for the project. The **Show All** checkbox toggles this filter off to show every template applicable based on the connectors define.

Select the Template Name and Connector

The screenshot shows the 'Template Library Wizard' dialog box. The title bar reads 'Template Library Wizard'. The main text says 'Specify the Template Name and Connector(s)'. The form contains the following fields and options:

- Name:** A text box containing 'Batch Trend'.
- Description:** A text box containing 'Line charts with a single pen for historical values.'
- History connector for the charts:** A dropdown menu with 'XLR_History_1' selected.
- Use Event Frame for Report Period:** A checked checkbox.
- Reporting Method:** A dropdown menu with 'Batch' selected.
- Reporting Method:** Two radio buttons: 'On Demand' (selected) and 'Scheduled'.

At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Enter a **Name**, a **Description** and the **Connector(s)** used to access data.

If the library template is configured for a history connector and there are **Event Frames** used in the project, the **Use Event Frame for Report Period** is enabled. By checking, all the configured **Event Frames** in the project are listed. For more information on **Event Frames**, see the **CONNECT, Setup Event Frames** in the document library. For more information on using Event Frames with library templates, see the **Templates Using Event Frames** section below.

The **Reporting Method** determines if the template is to be used *On-Demand* or *Scheduled*.

Customize the Content of the Template

The template may have a set of values that can be customized. This can range from captions and labels in cells to the addition/removal of items. For *Scheduled* templates, the tag names are specified.

The screenshot shows the 'Template Library Wizard' dialog box. The title bar reads 'Template Library Wizard'. The main text says 'Customize the Content of the Template.' Below the text is a table with three columns: 'Value', 'Caption', and 'Tag'. The table is organized into sections: 'Content', 'Title', and 'Variables'.

	Value	Caption
Content		
Title	Line Charts	
Variables		
Tag 1	MIXER_ZONE1_TEMP	Mixer zone 1 temperature
Tag 2	MIXER_ZONE2_TEMP	Mixer zone 2 temperature
Tag 3	EXTR_ZONE1_TEMP	Extruder zone 1 temperature
Tag 4	EXTR_ZONE2_TEMP	Extruder zone 2 temperature
Tag 5	BATCH_TANKTEMP	Batch tank temperature
Tag 6		

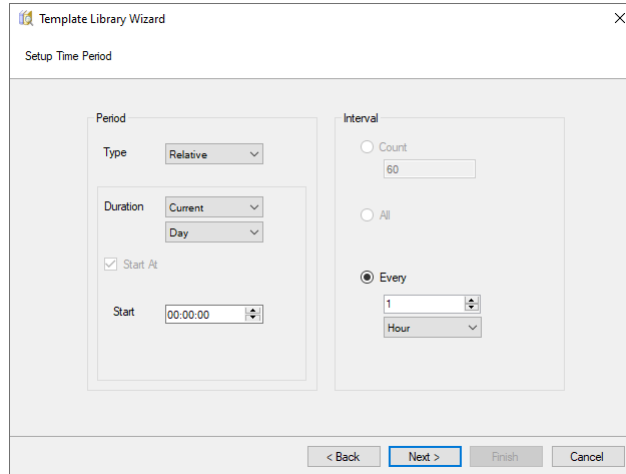
At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Not all tag names need to be specified.

The next steps are only applicable to a **Reporting Method** of *Scheduled*.

Setup Time Period

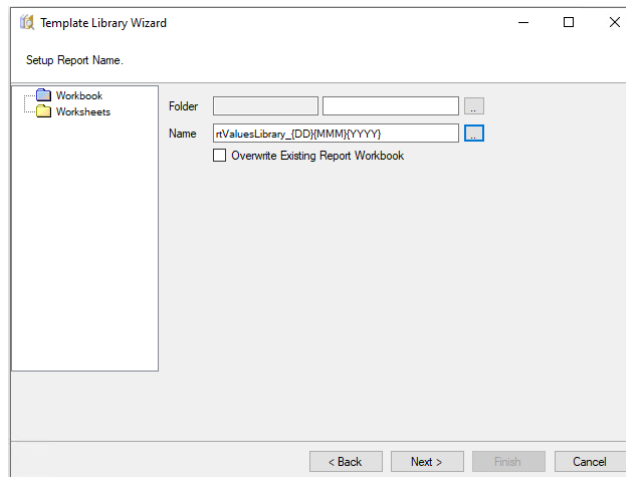
These settings define the overall **Period** of the report as well as the **Interval** used for the data spacing in the report.



Some templates may not allow all these settings to be modified. In addition, the **Type** and **Interval** options may change depending on the nature of the template, the data connector source(s) or if an **Event Frame** is used for the **Time Period**.

Setup Report Name

These settings define the **Report Names** for the template for the **WORKBOOK** and possibly **WORKSHEET**.

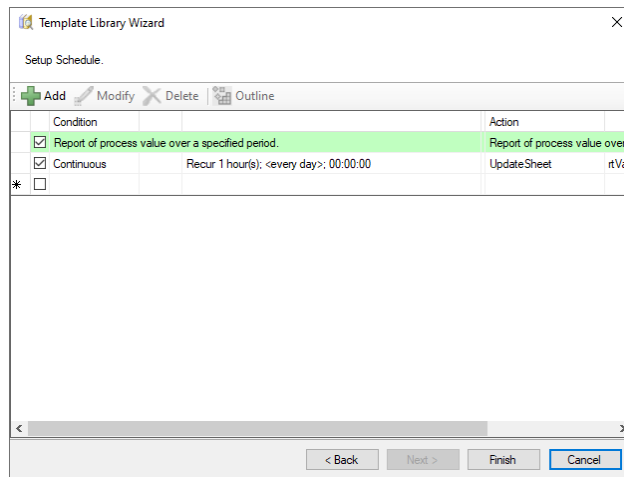


It is recommended to accept the default values. Modifying the **Workbook** setting to introduce a sub folder or changing the month from **{MMM}** to **{MMMM}** is perfectly acceptable.

For more information on **Report Names**, see DESIGN, **Template Studio** in the document library.

Setup a Schedule

These settings define the schedule lines used to generate reports from the template.



For templates that are period on time the schedule is usually complete. However, for templates based around process events, the schedule lines may contain keywords like *<StartEvent>*, *<ReportName>* or *<CollectEvent>*. In these cases, the keywords must be replaced (typically with tags from the real time data source) before the template is finished.

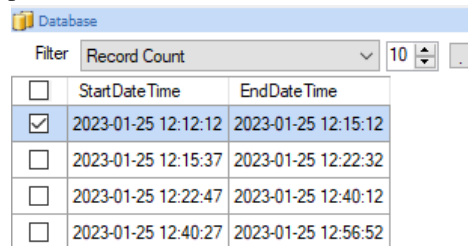
If additional publishing options are required like publishing to PDF or emailing a completed report, these actions can be added to the schedule before clicking **Finish**.

For more information on scheduling, see REPORT, **Deploy Schedule Reports** in the document library.

Templates Using Event Frames

On-Demand

If the **Use Event Frame for Report Period** option is checked for an **On-Demand** template, the template is deployed with a list of event frames. A selection in the list causes the start/end dates to be the Period of the generated report.

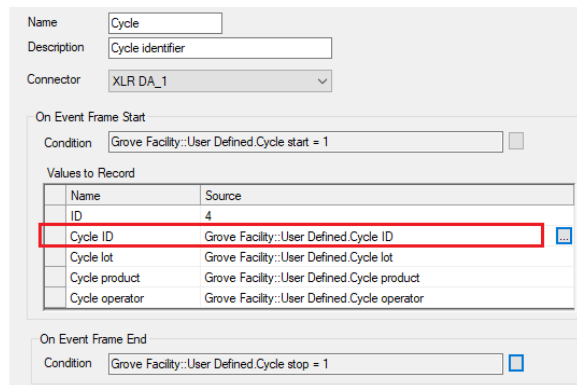


	StartDateTime	EndDateTime
<input checked="" type="checkbox"/>	2023-01-25 12:12:12	2023-01-25 12:15:12
<input type="checkbox"/>	2023-01-25 12:15:37	2023-01-25 12:22:32
<input type="checkbox"/>	2023-01-25 12:22:47	2023-01-25 12:40:12
<input type="checkbox"/>	2023-01-25 12:40:27	2023-01-25 12:56:52

The list of event frames is presented in the **Database Panel**.

Event Frame Definition

An **Event Frame** is defined using the Event Frame designer. An example configuration is as follows:



Name: Cycle
Description: Cycle identifier
Connector: XLR DA_1

On Event Frame Start
Condition: Grove Facility::User Defined.Cycle start = 1

Values to Record

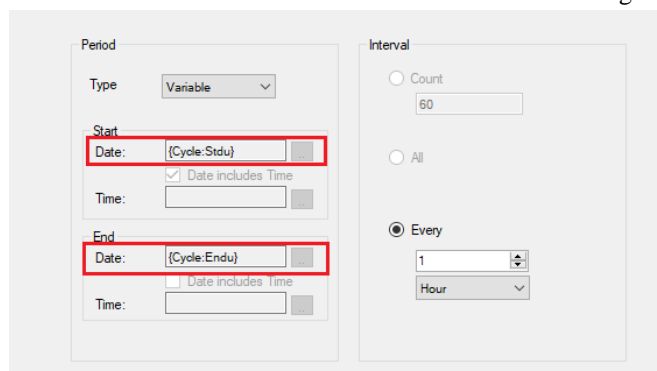
Name	Source
ID	4
Cycle ID	Grove Facility::User Defined.Cycle ID
Cycle lot	Grove Facility::User Defined.Cycle lot
Cycle product	Grove Facility::User Defined.Cycle product
Cycle operator	Grove Facility::User Defined.Cycle operator

On Event Frame End
Condition: Grove Facility::User Defined.Cycle stop = 1

In the above, the **Name Cycle** is used in various places in the template.

Scheduled

If the **Use Event Frame for Report Period** option is checked for a **Scheduled** template, the **Period** is configured to use the start and end date/time of the selected event frame. Using the example above:



Period

Type: Variable

Start
Date: {Cycle:Stdu} [calendar icon]
 Date includes Time
Time: [time picker]

End
Date: {Cycle:Endu} [calendar icon]
 Date includes Time
Time: [time picker]

Interval

Count
60

All

Every
1 [dropdown]
Hour [dropdown]

The fields **Stdu** and **Endu** represent the start/end of the frame.

If the template is configured to be scheduled, the **Report Names WORKBOOK** is set up to use a variable which is given a value in the scheduler.

Template	Folder	Report	Overwrite
WORKBOOK			
hdValuesLibrary.xlsx	{YYYY}\{MMM}	{hdValuesLibrary}	No
WORKSHEET			
*			
Template			

The **Schedule** is set up to set that variable to the first value recorded for the template.

Action:

Variable:

Value:

The variable is assigned the value at the end of event frame.

The report is produced at the end of the event frame with a delay of 5 seconds to ensure the event frame information is complete.

Condition

- Time
 - Continuous
 - Daily
 - Weekly
 - Monthly
- Event
 - RSLink_DA_1
 - XLR DA_1
 - XLR Reporter
 - Condition

Connector:

Tag:

Condition:

Value:

Deadband: %

Recur

Start:

Every:

Action Time Adjustment:

Action

- Produce Reports
 - Update Workbook
 - Update Worksheet
 - Update Workbook Groups
 - Update Worksheet Groups
 - Update Action List
- Publish Reports
 - Save Workbook to Web Page
 - Save Worksheet to Web Page

Action:

Worksheet:

Delay Execution

Process as Stack

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