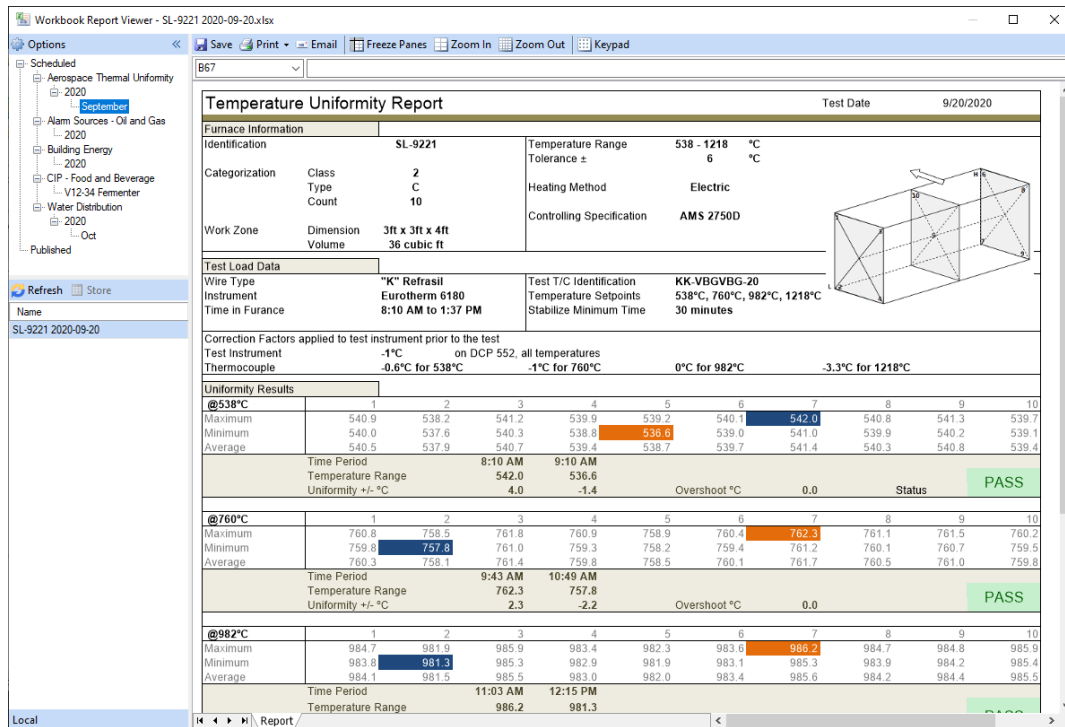


Report Viewer

Overview

XLReporter provides viewers for Workbook, PDF, and HTML file formats.

They provide read-only access to reports in a secure environment but will permit annotation if the user has sufficient permissions and that the report has been configured to permit such changes.



Configuration

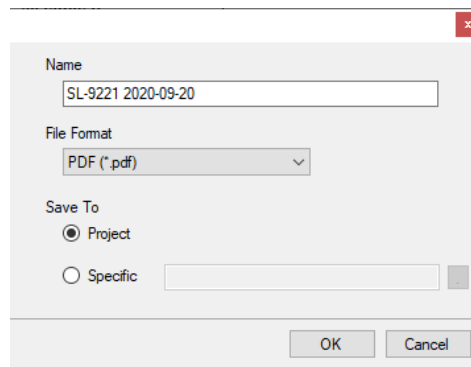
User Interface

The user interface of the viewers consists of a left view and a content view. The left view is where the reports are selected, and the content view shows the content of a selected report.

Menu Controls

Note that not every control is supported by every viewer.

- **Collapse/Expand** << >>
These buttons expand and collapse the Left View.
- **Save**
This option is only available in the Workbook Viewer.



This opens the **Save** dialog where the report currently viewed is saved.

The report is saved either to a specified folder or to a sub folder of the **Reports** folder named **Published**. If user security is enabled then the file is saved to a subfolder under the **Published**, named after the user.

- **Print**
This option is available for the Workbook and Web Viewer.

For the Workbook Viewer, there are options to print All Sheets (the entire workbook), Active Sheet (the currently visible worksheet in the viewer) or Selection (the range selected on the currently visible worksheet).

The selection is sent to either a local or on network printer.

- **Email**

This option is only available in the Workbook Viewer.

This opens the **Email** dialog where the report currently viewed can be sent as an email attachment in either workbook or PDF format.

The **Email To** setting list all the email configurations of the project (see **Email and SMS**)

- **Freeze Panes**

This option is only available in the Workbook Viewer.

This is a convenient way of keeping part of the report content fixed on the display while scrolling across or down. To freeze panes, select a cell and click **Freeze Panes**.

- **Zoom In, Zoom Out**

This option is only available in the Workbook Viewer.

These options zoom into and out of the report.

- **Keypad**

This option is only available in the Workbook Viewer.

This option opens a keypad to allow for manual data entry. This is mainly used for annotating reports using a Windows tablet.

Left View

The left view consists of two parts, a top panel showing a list of folders and a bottom panel that displays report files in each folder.

Menu

- **Refresh**

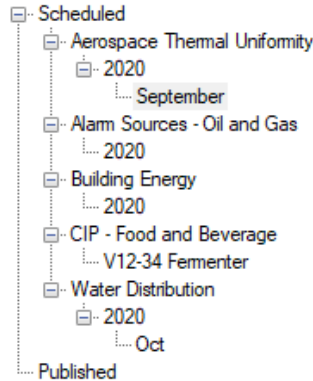
Click to refresh the report displayed

- **Store**

Click to store any annotations made to the report (see **Report Viewer Deployment**) such as comments.

Top Panel

The top panel consists of the **Scheduled** and **Published** which can be expanded to show sub folders (if any).



- **Scheduled**

Displays the folders and sub-folders that have been created automatically by the scheduler. When the viewer is used on a **Distributed Client**, these will be the folders on the **Distributed Server**.

- **Published**

Displays the folders been created by Distributed clients using the the **Save** option in the viewer. With this option, users can share reports of interest amongst other Distributed members.

Bottom Panel

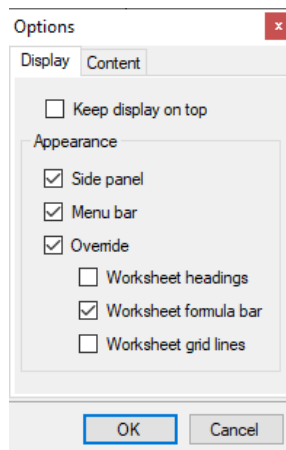
When a folder is selected, all the reports (files) in that folder are listed in the bottom panel. By selecting a file, its content is displayed.

Left View Controls

Options

Options is used to specify viewer behavior; it consists of two tabs: **Display** and **Content**.

- **Display Tab**



Note that the options are not available for all viewers.

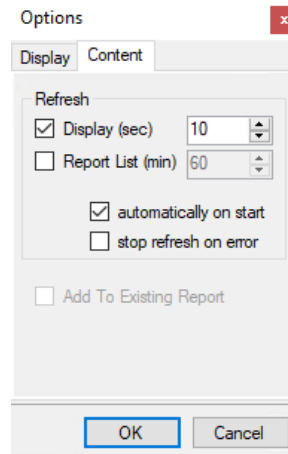
If the viewer is launched from an HMI display (see **Report Viewer Deployment**), it is preferred that it stay on top so that it is not lost behind the HMI display. In this case, select the **Keep display on top**.

Under appearance, the **Side Panel** and **Menu Bar** can be selected to be hidden. These settings will be retained when the viewer is closed.

When a report is created, it inherits settings from the template. The viewer can **Override** certain properties such as headings, formula bar and grid lines.

- **Content Tab**

This tab is only available for the Workbook Viewer.



If **Refresh Display** is checked, the viewer will refresh at the interval specified. An additional interval can be specified for the refresh of the **Report List** (Left View bottom panel).

For refreshing to start as soon as the viewer is opened. Check **automatically at start**. This option is useful if the viewer is launched by an external entity such as an HMI display.

For dashboard reports, the **stop refresh on error** option can be unchecked. Causing the report to continually refresh regardless of any errors that may be returned.

Deployment

Overview

XLReporter provides various methods to deploy the viewers, either as a standalone product or as part of an HMI system.

Deployment Considerations

Before deploying a viewer, consider the following:

- Which reports will be accessible by a user?
- Will the viewer permit report annotations?
- How will the viewer be opened and refreshed?

Viewer Accessibility

User can only access reports if their user credentials permits. The credentials are configured by enabling security on the project and defining users (see **Security**). If **User Security** is not enabled, then any user can use all the features of the viewers.

Template Security

If a template is designed with **Password Protection** (see **Security**), any report from the template will require the password in order to open it. Passwords are retained during a viewing session to avoid having to re-enter each time a protected report is opened.

Electronic Signatures

With the workbook viewer, electronic signatures can be applied to a report to validate its content. The procedure for setting up electronic signatures is discussed in detail in the **Security** help document.

Viewer Annotations

By default, the viewer opens reports in read-only mode, not permitting any edits. However, if the cells of a template are **UnLocked**, then the user will be able to enter information in those cells only.

To unlock cells, open the template in the **Design Studio**. Highlight the cells to be unlocked and select **Format, Unlock** cells. A similar procedure is followed using the design studio add-in in Excel where it is called **Protection**.

When a report is generated from the template, the unlock cells can be edited and the changes can be **Stored** using the button in the **Left View**.

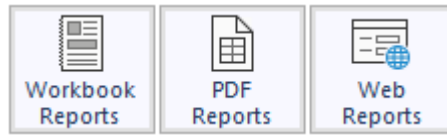
XLReporter supports various editing options such as lists and popups. These are configured by adding Data Validation to the cells using the option on the Worksheet tab of the Design Studio. Again, a similar feature is provided by the add-in in Excel.

Annotations are permitted locally or from any **Distributed Client**, even to reports that are actively being updated. However, the users must have appropriate credentials to do this (see **Security**).

Viewer Open and Refresh

The viewer can be opened in various ways. Note that it is possible to open multiple copies of the viewer at the same time.

From where **XLReporter** is installed, the viewers are opened from the right-side **Tools** tab of the **Project Explorer** in the **Report** section by selecting one of the following:



If there is a need to open the viewer externally from the XLReporter Scheduler (Run an Application), command line or from a pushbutton click in the HMI, then the following application are executed:

- **Workbook** *C:\XLReporter\bin\XLRxView.exe*
- **PDF** *C:\XLReporter\bin\XLRxViewPDF.exe*
- **HTML** *C:\XLReporter\bin\XLRxViewWeb.exe*

Shortcuts to these applications are provided in the **Start Menu** of the **XLReporter** folder. Without parameters, the viewer will show the last viewed file.

If a specific file is needed, then this can be specified as follows:

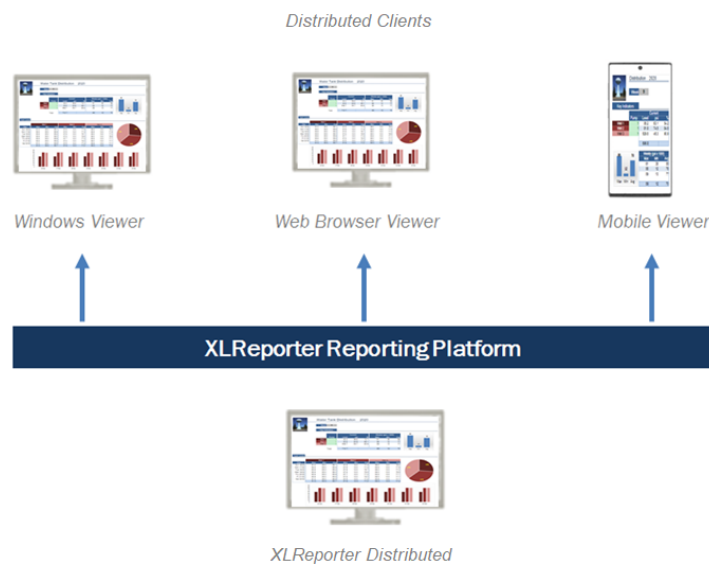
- **Workbook** *C:\XLReporter\bin\XLRxView.exe "Scheduled!ReportFolder\ReportName"*

The *ReportFolder* represents a sub folder in the projects **Report** folder and the *ReportName* is a specific file. If the latest file in the folder is required, then set the *ReportName* to *.

Since it is possible to configure the viewer to automatically refresh the above opens the possibility of launching the viewer to open and automatically refresh the report (which is probably being update by the scheduler in the background)

XLReporter Ultimate

XLReporter Ultimate is a distributed edition of where reports in a central location are accessible from remote clients (distributed clients). The clients can be web clients using a web browser or windows clients creating the possibility of integrating the clients into distributed displays of HMI systems.



Reports can be viewed from both the Web Portal and the Distributed Windows Clients. For more information, see REPORT, **Setup the Web Portal**.

If annotating, e-signatures, template access protection and/or auto refresh are required, it is recommended to use the Distributed Windows Client.

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