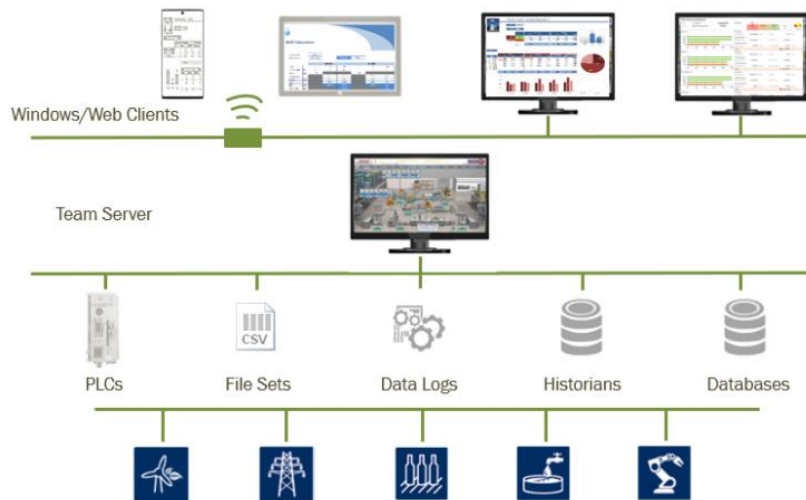


Web Portal

Overview

The web portal is installed with the **Distributed** edition. It gives remote access to reports and forms on the server. Using the web portal you can generate reports on demand, view scheduled reports generated automatically in any format and collect manual data.



There are 2 ways to access the web portal:

- Distributed clients installed on Windows PCs
- A web browser from any device on the network

Extending Across Networks

In facilities following the Purdue model with production and business networks with a DMZ set up in between, the front end of the web portal can be installed on the DMZ to allow users on the business network access to the web portal from their web browsers. For more information, see the **Web Portal Front End Setup** section below.

Initial Setup

During installation, if the **Distributed Edition** is selected, if Internet Information Services (IIS) is not enabled or does not have all the features enabled for **XLReporter**, installation prompts to install these features.

If installation fails to enable these features, please use the following to manually enable IIS and select the required features.

Internet Information Services

Please note, this setup must be done manually by an **Administrator** of the system.

The procedure for installing and configuring IIS depends on the operating system.

Windows 8/ Windows 10/ Windows 11

To install, open the **Windows Control Panel** and select **Programs and Features**.

Select **Turn Windows Features on or off** to display a list of Windows Features. Check **Internet Information Services**.

Expand **Internet Information Services** then **Web Management Tools**. Make sure the following items are checked:

- IIS Management Console

Expand **Internet Information Services, World Wide Web Services**.

Expand **Application Development Features** and make sure the following items are checked:

- ASP.NET (4.x)
- .NET Extensibility (4.x)
- ISAPI Extensions
- ISAPI Filters

Expand **Common HTTP Features** and make sure the following items are checked:

- Default Document
- Directory Browsing
- HTTP Errors
- Static Content

Expand **Health and Diagnostics** and make sure the following items are checked:

- HTTP Logging
- Request Monitor

Expand **Performance Features** and make sure the following items are checked:

- Static Content Compression

Expand **Security** and make sure the following items are checked:

- Request Filtering

Click **OK**.

Windows Server 2016 and above

To install, open the **Windows Control Panel** and select **Programs and Features**.

Select **Turn Windows Features on or off** to display **Server Manager**. Select **Add Roles, Server Roles**, then check **Web Server (IIS)**. Add the feature. Under **Web Server Role (IIS)** select **Role Services**.

Expand **Web Server, Common HTTP Features** and make sure the following items are checked:

- Default Document
- Directory Browsing
- HTTP Errors
- Static Content

Expand **Health and Diagnostics** and make sure the following items are checked:

- HTTP Logging
- Request Monitor

Expand **Performance** and make sure the following items are checked:

- Static Content Compression

Expand **Security** and make sure the following items are checked:

- Request Filtering

Expand **Application Development** and make sure the following items are checked:

- ASP.NET (4.x)
- .NET Extensibility (4.x)
- ISAPI Extensions
- ISAPI Filters

Installation

When installing the **Distributed** edition, you are prompted for some information regarding your system.

The screenshot shows a dialog box titled "Distributed Edition" with a close button (X) in the top right corner. The dialog contains several input fields and a section for account identity. The fields are: IP Address (192.168.8.252), Application (XLRweb), Physical Path (C:\XLReporter), Website (Default Web Site), and Web Portal URL (192.168.8.252/XLRweb). There is an unchecked checkbox labeled "Advanced". Below these is the "Identity" section, which has two radio buttons: "Built-in account" (selected) and "Custom account". Under "Built-in account", there is a dropdown menu showing "ApplicationPoolIdentity". Under "Custom account", there are three input fields: "Account" (Admin), "Password", and "Confirm". At the bottom of the dialog are two buttons: "Setup" and "Cancel".

IP Address is the IP address of the local machine that users will enter to access the web portal. This is only configurable if there are multiple IP addresses detected on the system.

Website defines the site in IIS where the *XLRweb* application is installed. By default, this is *Default Web Site* but if you would like to change this to another site defined in IIS, check **Advanced** and select the **Website** from the list.

The **Web Portal URL** is the URL any user will use to connect to the web portal based on the settings above. This can be copied to the clipboard to use after installation is complete.

Identity

These settings define the user account under which the web portal runs. By default, this is set to **ApplicationPoolIdentity** which is a built-in, very low-level user. If **XLReporter** needs to access data or publish reports to other places on the network that require a higher-level user, this can be changed to either another **Built-in account** or a **Custom account** which is a configured user on the machine or domain.

System Check

If these settings need to be changed after installation, this application can be launched from **System Check**. **System Check** is available in the **Project Explorer** under the **Tools** tab.

Once in **System Check**, select **Tools, Set up Web Portal** to access this application and make any changes needed.

Note, Windows Administrator privileges are required to access this application.

User Accounts

If user accounts are not enabled in the project on the server, when a user navigates to the web portal using a web browser, they are automatically logged in as a **Guest**. By default, the user has full rights to every template in the project to generate reports on demand as well as viewing any existing scheduled reports.

If user accounts are enabled in the project on the server, when the user navigates to the web portal using a web browser they are prompted for **User Credentials** to log in.

In order to use the web portal with a Windows client, user accounts must be enabled.

Client Licensing

Clients are licensed concurrently whether you are accessing the web portal using a web client or a Windows client. Once the number of logged in users exceeds the number of client licenses, any log in is rejected until one or more users logs off.

Web Portal Front End Setup

To install the web portal front end on the DMZ to make it accessible to users on the business network, the XLReporter Distributed Edition must be first installed on the production network and must be accessible from the DMZ. This may require ports to be opened on the Windows Firewall.

Installation

To install the web portal front end, on the machine to install it on, open a web browser and navigate to
`http(s)://IPAddress[:Port]/XLRweb/SetupFrontEnd.htm`

Where *IPAddress* is the IP address of the XLReporter server and *[:Port]* is the port number if not default. (e.g. **:81** for Port Number 81)

This downloads **SetupXLRWebFrontEnd.exe** to the system. Run this to begin installation.

Note that if there are issues navigating to the URL this file can be manually copied from the XLReporter server. It is located in the **XLReporter** install folder (**C:\XLReporter** by default) in the **team** subfolder.

During installation, if Internet Information Services (IIS) is not enabled on the machine, installation prompts to enable it. If this fails, please follow the **Internet Information Services** section above to enable based on the Windows Operating System.

After the files are installed, the **Web Portal Front End Setup** dialog appears to prompt for information regarding the system.

IP Address is the IP address of the local machine that users will enter to access the web portal front end. This is only configurable if there are multiple IP addresses detected on the system.

Website defines the site in IIS where the *XLRweb* application is installed. By default, this is *Default Web Site* but if you would like to change this to another site defined in IIS, check **Advanced** and select the **Website** from the list.

The **Web Portal URL** is the URL any user will use to connect to the web portal based on the settings above. This can be copied to the clipboard to use after installation is complete.

In the **Back End Server** section, the **IP Address** is the IP address of the XLReporter server on the production network. The **Port** is the port number that the web portal is running on, either **Default** (port 80) or a **Specific** port number.

Click **Setup** to continue with the web portal front end setup. A prompt appears asking to copy images from the back end server. If **Yes** is selected, any custom image set up for the web portal on the XLReporter server is copied to the front end and used for web clients navigating to the web portal front end.

Note, if any of these settings need to be changed after installation, this can be re-run by opening Windows File Explorer navigating to the **bin** subfolder of installation (**C:\XLRwebFrontEnd\bin** by default) and running **xlrIISFronEnd.exe** (Administrator access is required).

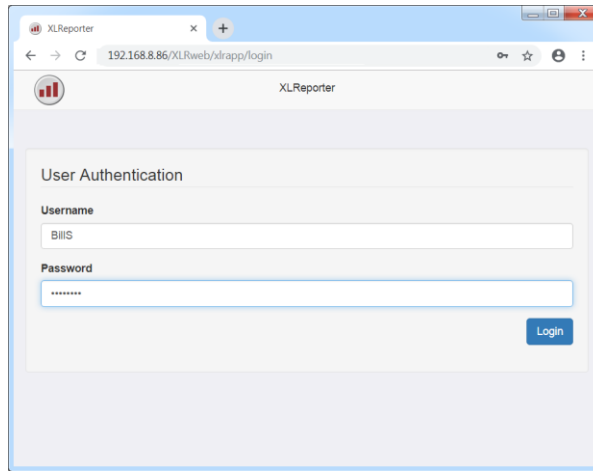
Web Clients

The web portal can be accessed by any device with a web browser.

To do so, simply open your web browser and navigate to:

[http\(s\)://IPAddress/XLRweb](http(s)://IPAddress/XLRweb)

Where *IPAddress* is the IP address of the XLReporter server or web portal front end if set up.



If user accounts are enabled, log in using a valid user account set up on the server and you have access to all the templates and reports on the server. Otherwise, you are navigated straight into the list of templates.

Note, if the website that the *XLRweb* application is installed under is not using port 80, the port number must be specified as part of the IP address in the URL. For example, if the website is using port 81, the URL to access the portal would be:

[http\(s\)://IPAddress:81/XLRweb](http(s)://IPAddress:81/XLRweb)

Guest Account

If user accounts are enabled in the project and you want to provide a simple login for casual users that can be used by multiple users at one time, in User Accounts, create an account named **Guest**. Assign the Guest account to a group with the privileges you want casual users to have.

Please note that while multiple users can be logged on as **Guest** at the same time, each user occupies one of the available client licenses.

Note that the Guest account's **User Preferences** will not be retained after logging out. To retain preferences, user accounts must be created with the project.

User Preferences

User Name bills	Email wshephard@sytech.com
First Name William	Last Name Shephard
Location Name 	System Version 141
Language English	Show Template Category Yes
Reports Published on Server View/Download Excel Files	Reports On-Demand Download PDF Format
Report Filter 10 <input type="radio"/> Days <input checked="" type="radio"/> Count	Auto Hide Panel No

Save

Once logged in, click on your name in the upper right to access the **Preferences**.

If the project has been configured with categories, **Show Template Category** can be toggled so the template list in the web portal to show categories. Note that if the project is not configured with categories this option is disabled.

Reports Published on Server determines the view and download format of the reports that have been created on the server by the scheduler or published to the server by other users. Select between *View/Download PDF Files*, *View/Download Excel Files* and *View/Download HTML Files*.

Reports On-Demand determines the download format of reports that have been produced on-demand in the client. Select between *Disable Download*, *Download PDF Format* or *Download Excel Format*.

Report Filter determines how many reports you can view from each template. This can be expressed in *Days* or as a *Count*.

If **Auto Hide Panel** is set to *Yes*, when a report is generated or viewed from a desktop or tablet, the left panel is hidden and the report becomes full screen automatically.

Click **Save** to store the settings.

Viewing Scheduled Reports

When a template is selected that has existing reports on the server, a list of the reports is displayed. Select any report to view it in the web browser. Note that the format that is shown is the one selected in **Preferences**.

The report can be downloaded by selecting the download option in the title bar.

SL-9221 2020-09-22 Excel

To hide the left panel and view the report full screen, click the button. To bring the left panel

back, click the button. If you would like the left panel to be hidden automatically whenever you view a report, go to **Preferences** and set **Auto Hide Panel** to *Yes*.


On Demand Reports


Templates can be designed to allow users to specify parameters that drive the report. To see the parameters, select a template.


The parameters are listed in the left panel for the template.

In the above example a parameter panel is used to prompt for the **Furnace** name and a **Date**. A versatile set of entry panels is provided in **XLReporter**.

The report can be downloaded by selecting the download option in the title bar.

SL-9221 2020-09-22  Excel

On desktops and tablets, to hide the left panel and view the report full screen, click the  button.

To bring the left panel back, click the  button. If you would like the left panel to be hidden automatically whenever you generate a report, go to **Preferences** and set **Auto Hide Panel** to *Yes*.

Responsive Viewing

Responsive viewing causes the report to respond to the viewport of the device. There are 3 sizes supported:

- Small (mobile phone)
- Medium (tablet)
- Large (PC)

This can be done in two ways:

Designated Sheet(s)

In the template workbook, you can designate one or more worksheets for a specific device size by adding “small” or “medium” to the worksheet name.

When the report is generated, if the device is small, any worksheet containing “small” is shown while any other sheet is hidden. Same for medium.

For large, any sheet designated “small” or “medium” is hidden.

Getting Started

When creating a new template from the Template Studio, check **Import Existing Workbook** and click **OK**. From the **Import** folder select **ResponsiveDesign.xlsx**. This template provides guidelines and sample layouts for all 3 available sizes.

Named Ranges

In the report template you can define one or more ranges as the elements to show when a device of a certain size is used.

For example, if the report contains 15 minute data over the day along with a summary, when viewing the report on a large device like a PC you may want to see everything but when viewed in a small device like a phone you may only want to see the summary.

To designate a range for a specific device size, you must assign a name to that range with the device size, e.g., name cells B4:E8 as **Small**. If you want multiple ranges to display for a particular device size, each range should be named **Size_Number**, e.g., *Small_1* and *Small_2*.

You can designate both **Small** and **Medium** ranges. For large devices, the entire report is shown.

When applying a name to the range, be sure to set the **Sheet** to the specific worksheet containing the range. Only names with a sheet set to a specific sheet are considered, names scoped to all sheets are not considered.

To fit the ranges onto a single worksheet widthwise, your ranges should not exceed 600 pixels. When the range is rendered for the report for the device, if the width is less than 600, the range is resized to as close as 600 pixels as possible to provide you the best view for your device without having to do any resizing.

By default, when ranges are stacked for small or medium, a horizontal page break is inserted to attempt to prevent a range from bridging over 2 sheets. If this is restrictive page breaks can be added manually. When defining the range name, set the end of the name to “_PB”, e.g., “Small_2_PB”. When this range is stacked, a horizontal page break is inserted before the range.

Customizing the Portal

The following options can be customized for the web portal. These changes are made in the on the server from the **Project Explorer** from the **File** menu by selecting **Settings. Web Access**.

Settings

General Security Workbook Reports PDF Reports Web Portal

Folder: C:\XLRprojects\XLR_Demo\Web

Portal

URL: http // 192.168.8.62 /XLRweb

Setting	Value
Main Title	XLReporter
Welcome Caption	Welcome to XLReporter
Report Image	view-report.png
On Demand Image	produce-report.png
Info Image	view-report-info.png
Main Image	company-logo.png

OK Cancel

Changes are displayed on a new login. If they are not, the browser cache may need to be cleared first.

Titles

Main Title

The main title is seen on the Login page as well as at the top of the template list. By default, this is **XLReporter**.

Welcome Caption

The welcome title is seen above the welcome screen after logging in to the portal. By default, this is **Welcome to XLReporter**.

Images

Report Image

The Report image is seen in the menu after a report template is selected.
The image dimensions are 32 x32 pixels.



On Demand Image

The On Demand image is seen in the menu after a report template is selected.
The image dimensions are 32 x32 pixels.



Info Image

The info image is seen in the menu after a report template is selected.
The image dimensions are 32 x32 pixels.



Main Image

The logo image is seen in the upper left corner of the portal after logging in.
The image dimensions are 78 x50 pixels.



Welcome Image

The welcome image is seen on the home page of the portal after login.
The image dimensions are 800 x 650 pixels.



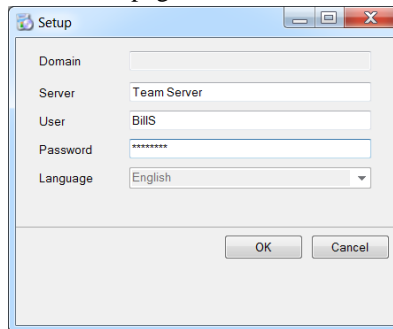
Windows Clients

Setup

Windows clients can be installed from:

- The **XLReporter** installation by setting the **Edition** to *Windows Client*.
- Copy **setup.exe** out of the *C:\XLReporter\team* folder on the server machine to a flash drive or directly to the client machine.
- Open a web browser and navigate to the URL *http://<server>/XLRweb/Setup.htm*. The *<server>* identifies the server hosting the team portal e.g., *Computer Name* or an *IP address*.

Click the **Install** button on the web page. This downloads **setup.exe** to your system.



Specify a valid **User** and **Password**, select the **Language**, and click **OK** to install the software.

Note, if the website that the *XLRweb* application is installed under is not using port 80, the port number must be specified as part of the **Server** setting. For example, if the website is using port 81, the **Server** setting above would be:

TeamServer:81

Alternatively, if the IP address where used, the format would be:

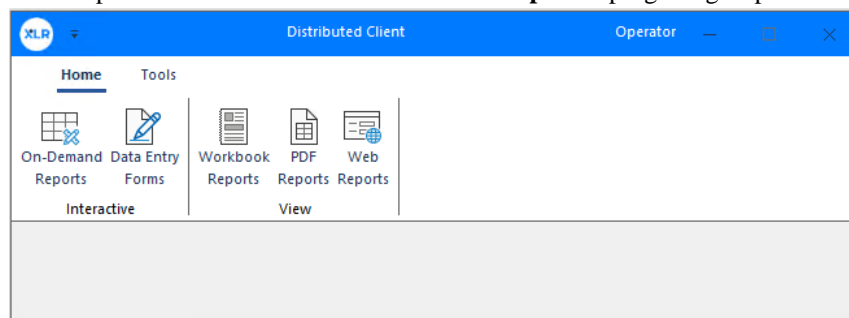
IPAddress:81

When the installation is complete, open the **Start** menu and under the **XLReporter** program group, click on Distributed Client. All applications are available from the **Distributed Client**.

Distributed Client

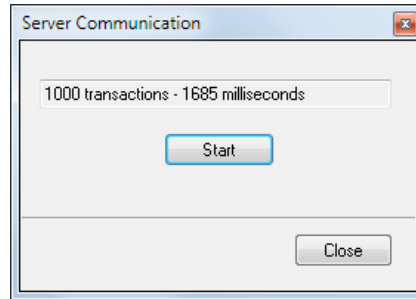
The **Distributed Client** gives easy access to the application running on the server. It is also where users log on and off the system. This must stay opened in order to remain logged in and use any of the applications provided. Once it is shut down, the user is logged off and any **XLReporter** application running is immediately closed.

The application is opened from the **Start** menu in the **XLReporter** program group



When opened, you are prompted to log in. Once logged in, the user name is displayed in the title bar.

To confirm the communication between the client and the server, select **Tools, Test Communication**.



For more information on the applications opened, see the **Project Explorer** documentation.

Minimizing the Dialog

By default, this dialog remains on the top of all other windows. Since it must stay open to remain logged in, you can minimize it to the task bar.

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