

Create Report Snippets in XLReporter for WIN-911 Control Center Dashboards

Overview

Now that XLReporter and WIN-911 are together in the SmartSights family, report snippets from XLReporter reports can be integrated as widgets into Dashboards in the WIN-911 Control Center.

This guide walks through the setup for creating report snippets within **XLReporter** and the setup required in the WIN-911 Control Center.

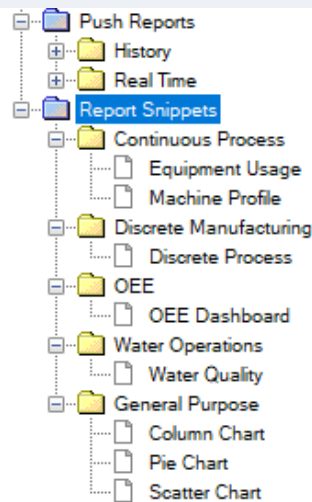
What is a Report Snippet?

A report snippet is a range or chart object in a report that is exported as an image. In XLReporter, this is done as part of the report template design by configuring a **Data Management** connection under the **Category Data Export** and the **Type** as either *Range to Bitmap* or *Chart to Bitmap*.

In order to make report snippets in a template available as a widget in the WIN-911 Control Center, the template must be configured to either require no parameters to run or must be set up with at least one instance to provide a set of values for the parameters required.

XLReporter Template Library

Creating a report template with snippets from XLReporter's Template Library is very straight forward. Open the Template Library by selecting **Home, Template Library**. A **Report Snippets** category is available.



All of the templates listed are set up to export one or more report snippets. For each template available all that is required is to specify the name of the template, the connector to get the data from and a list of tags from that connector.

The populated report can then be generated **On Demand** just by clicking the **Refresh** button.

XLReporter Template Studio

Templates can be built from scratch (or from an existing Excel workbook) using XLReporter's Template Studio. Any Excel feature can be used as part of the template. This includes things like formatting (including conditional formatting), formulas, charts, and graphics.

For more information, see **DESIGN, Template Studio** in the **Document Library**.

Management Connections

When configuring the **Range to Bitmap** or **Chart to Bitmap** Management Connections for report snippets here are a few things to keep in mind:

Directory and File

For both the **Range to Bitmap** and **Chart to Bitmap** management functions there are **Directory** and **File** settings. These settings determine where the bitmap file is stored on the system and what the name of the bitmap file is. Avoid using any variables or name types (e.g., {YYYY}, {MMM}, {Tag 1}) for these settings as these will not be delivered as snippets.

The only variable that can be used for these settings is *{Instance}*. This should only be used if the template is configured with multiple instances where each instance generates a set of report snippets. When the list of available snippets is delivered, *{Instance}* is normalized to the name of the instance submitted with the template.

For **Directory**, the setting can either be a full path or a subfolder of the **Workbook Reports** folder of the project. If left blank, the snippet is stored directly in the **Workbook Reports** folder of the project.

Range to Bitmap

The **Range** setting for this management function can either be fixed in size or dynamic based on the amount of data in the report. This all depends on the **Direction** and **End** settings configured.

A range can consist of any Excel feature including charts, formulas and conditional formatting, including things like data bars, color scales and icon sets.

Bear in mind that the larger the range, the larger the snippet and the more real estate it will consume in the WIN-911 Control Center Dashboard.

Chart to Bitmap

When specifying the **Chart Name** for this management connection, a list of all the charts configured in the template are displayed in the format *chart name – range location*. Note that after selection, if the chart name is a default (e.g., *Chart 1*), the name may change to *xlr 1*. This is because when default chart names are used, they can change if the worksheet is copied which can cause issues. By changing the name to something other than default, this issue is avoided.

Font and Size Recommendations

While you are free to use any font you would like for text in the snippets, we recommend using the *Segoe UI* font as this is the font used in other widgets within the WIN-911 Control Center.

As for the size of the report snippet when displayed as a widget in the WIN-911 Control Center, it is recommended to keep each file 300 pixels wide (32 points) and 118 pixels high (70 points). The maximum number of files that a snippet widget can be is 3 x 3.

Report Generation

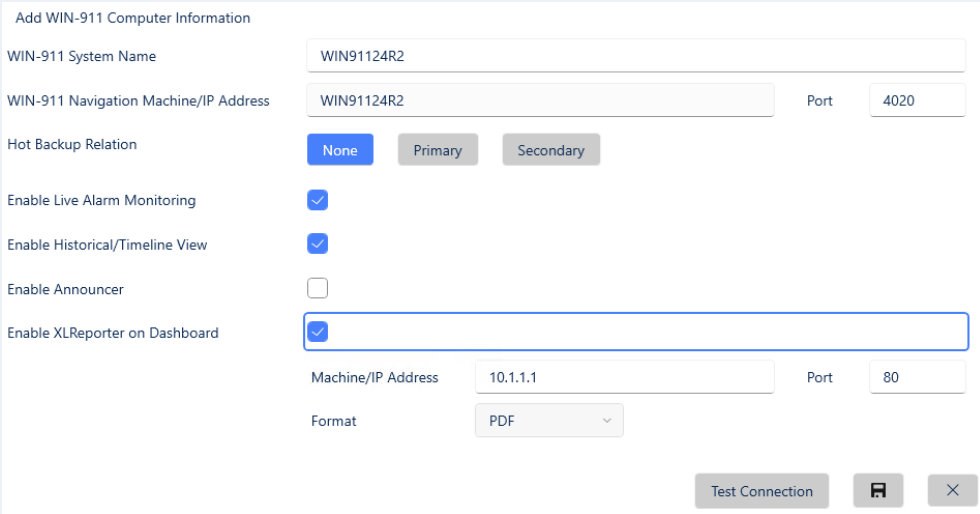
Before leaving XLReporter, it is recommended that the report be generated at least once using the **On Demand Reports** application to ensure there are no issues and that all the snippets generate as expected.

In addition, if the template requires parameters, at least one instance need to be created. This is also done in the **On Demand Reports** application.

WIN-911 Control Center

To configure the report snippets in WIN-911, open the **WIN-911 Control Center**.

Configuration



When adding a WIN-911 System in the Control Center Configuration, check the **Enable XLReporter on Dashboard** setting.

Set Machine/IP Address to the name or IP address of the machine where XLReporter is running along with the **Port** number set up for the XLReporter web portal.

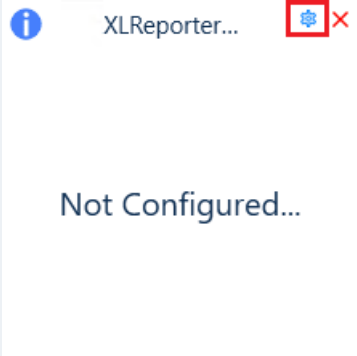
The **Format** setting specifies the format of the report for the snippets. If Microsoft Excel is installed on the machine, this can be set to *Excel*, otherwise it should be set to *PDF*.

Dashboards

Once *XLReporter* is enabled in the **Control Center**, when editing a **Dashboard**, under the **Add Widget** panel, **XLReporter Snippet** now appears.



Select this widget and click **Add** to add a report snippet widget.



To configure, click the gear icon at the top right of the widget.

Widget Configuration

Title: XLReporter Snippet

Display System Name

Refresh After: 10 min v

Templates Mixer Line Charts v

Snippets Mixer 1 Temp v

Refresh Templates List

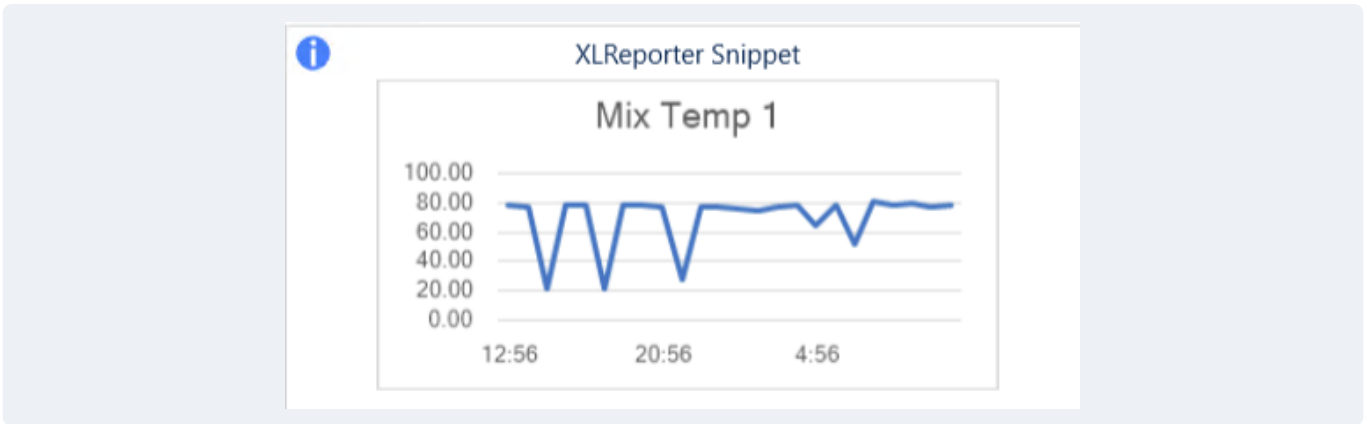
Tile Size

1 v ^

1 v ^

Width Height

All the available **Templates** and **Snippets** from those templates are listed here. Select the one to display. Set the **Refresh** rate and **Tile Size** accordingly. The **Refresh** rate can be set to as low as 1 minute and the **Tile Size** can be set from 1x1 to 3x3.



On save the snippet appears as a widget in the Dashboard and updates at the rate specified. It can also be refreshed manually by clicking the refresh icon in the upper right corner of the widget.

To view the entire report this snippet came from, double-click the widget. The report is displayed based on the **Format** set in configuration.