Setting up XLReporter for WIN-911 Integration

Overview

The following provides a quick start guide for installing and configuring **XLReporter** for integration with WIN-911.

XLReporter Installation

Prerequisites

XLReporter can be installed either on the machine where WIN-911 is installed (or where you plan to install WIN-911) or any another machine on the same network.

XLReporter can be installed on Windows 10 or above as well as Windows Server 2012 and above.

Microsoft Internet Information Services (IIS) must be enabled on the machine where XLReporter is installed. This is enabled within the Operating System. Please review the **Setup IIS for Distributed Installations** document in the XLReporter documentation for details on how to set up and configure IIS.

Edition

During installation, for **Edition**, select the *Distributed Edition* of **XLReporter**.

Distributed Edition Setup
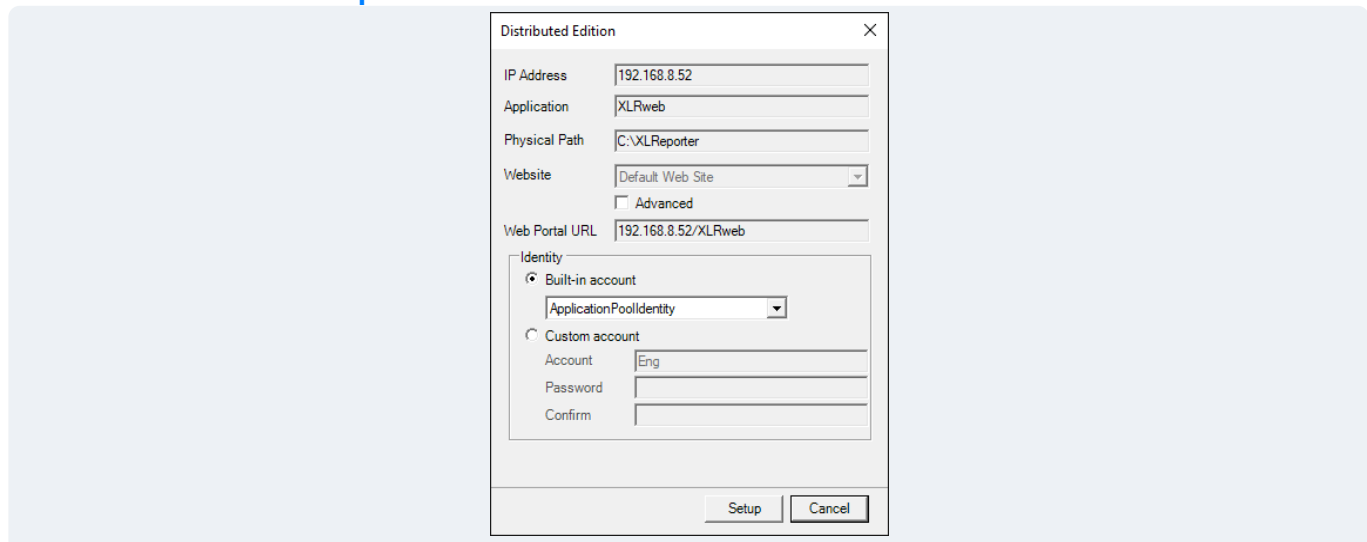
As part of the Distributed Edition installation, you must specify information about your system to establish how distributed clients will connect.

This includes establishing the **IP address**, **IIS website** to install the application into and the **Identity** of the Windows user that the **XLReporter** application runs under.

Make note of the **Web Portal URL**. This will be needed in order for any client (including WIN-911) to connect to **XLReporter**.

This information can be changed after installation through the **System Check** application.

Product Registration

After installing, the product can be registered from the right-side **Tools** tab of the XLReporter **Project Explorer**. Select **Register**, enter in the first, last, and company name and select the option to **Start Trial**. This will register you for 2 hours.

If you have purchased, select **Register** again. Now the **Register** button will be available. For details on the different registration procedures, see **SETUP, Product Registration** from the Document Library.

Project Setup
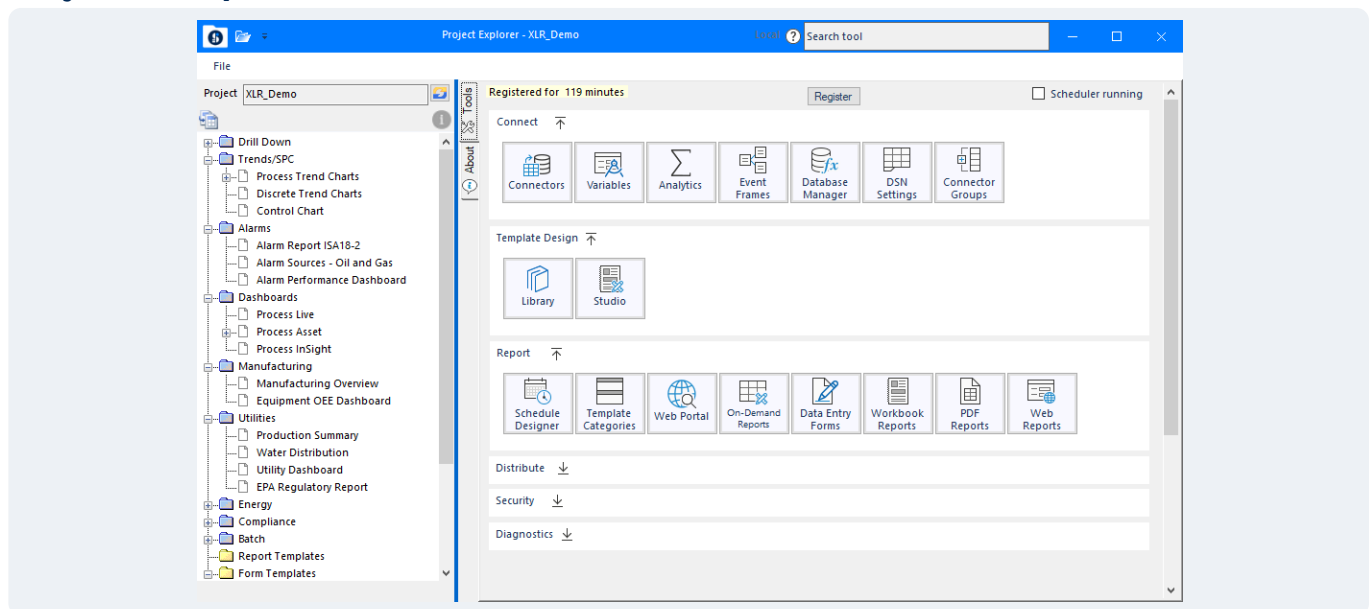
After installation is complete, XLReporter's **Project Explorer** is opened with the Demo project that is provided to demonstrate some key XLReporter features.

It is recommended to create a new project for your own purposes rather than working within the demo project.

To do so, select **File, New Project** in the **Project Explorer**. Leave *New Project* selected and click **OK**.

Specify a **Name** and **Location** for the project. You can also specify a **Description** if you would like. Click **Next**.


Configure connectors to every data source you would like to report from. These can be data sources that provide real time data from PLCs and HMI systems, production historians, databases, text files, etc.

If you are setting up a system to demonstrate and have no "real" data sources available, XLReporter provides simulated data that serves both real time and historical data to use.

Click **Finish** to complete the new project setup.

Create a Report Template

To quickly generate a report template that can be used with WIN-911, from the **Project Explorer** on the right-side **Tools** tab in the **Template Design** section, select **Library** to open the **Library Wizard**.
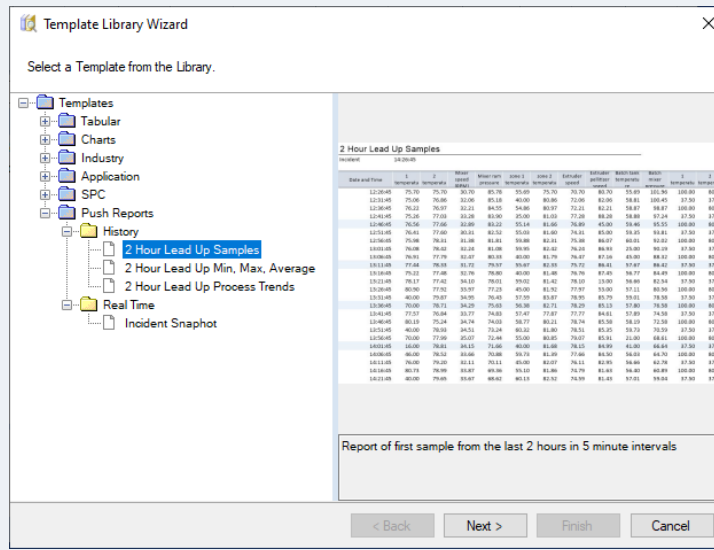
Expand **Push Reports**. If you only have live data sources, expand **Real Time** and select any available template. Otherwise, if you have historical data sources expand **History** and select any available template.
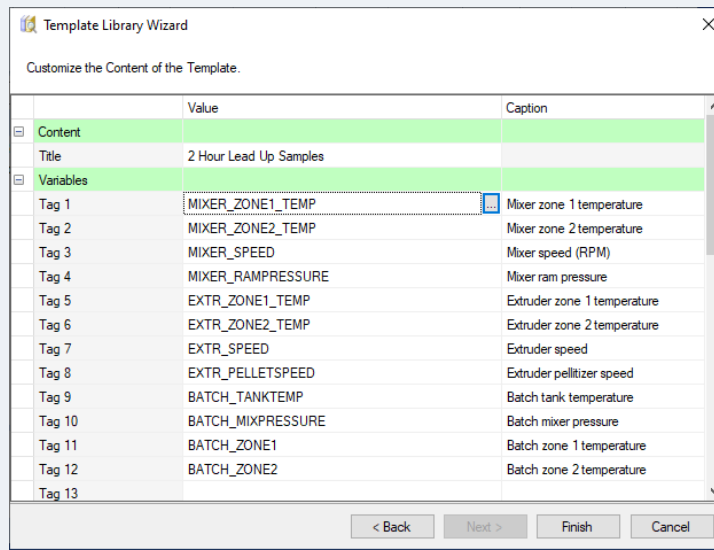
Select the tags available from your data source that you would like to report on. Click **Finish** to create the template.

On **Finish**, the On-Demand Reports application is opened so a report can be generated. The push report templates are designed to run on demand without the user having to provide any parameters, they simply click **Refresh** and generate the report. You should do so to ensure that the template is set up correctly.

This template can also be run using XLReporter's **Web Portal**. It is recommended that you do this from the machine where WIN-911 is installed (or will be installed) to verify network communication.

Open the web browser on the machine and navigate to the Web Portal URL you noted during installation. Select the template you created in the Template Library Wizard and click **Refresh** to ensure the report can be generated.

At this point you have successfully set up XLReporter and can now integrate the report template you set up within your WIN-911 alarm notification system.