

## Using XLReporter with DeltaV Batch Historian

### Overview

**XLReporter** takes historical values directly from the DeltaV Batch Historian automatically to populate workbooks, periodically, via VBA or on event, without needing Excel. The award winning **XLReporter** history engine can return either raw or calculated Industrial metrics directly to the reports.

Distribute the reports by email, FTP, file server and printers. Enable **XLReporter's** Web Portal and access reports from any device supporting a web browser such as a smart phone or tablet.

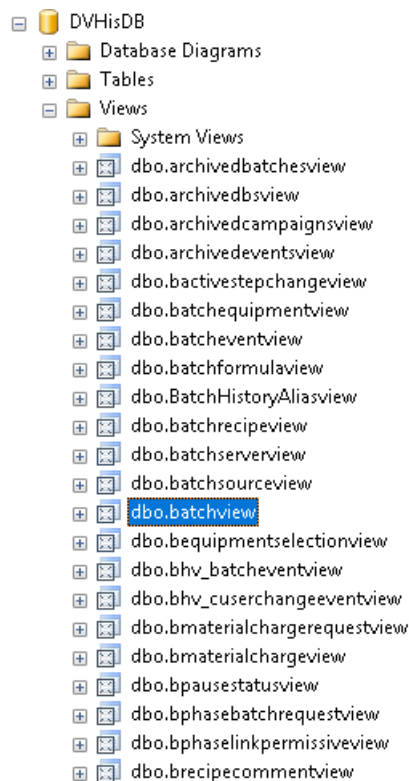
### Prerequisites

#### Verify Database

To verify, open **Microsoft SQL Server Management Studio** and connect to the SQL Server instance where the Batch Historian database is configured.

Once connected,

- Expand the **DVHisDB** database.
- Expand **Views**.
- Select the **batchview** view.



Right click the **batchview** view and choose *SELECT TOP 1000 Rows*. This should display data from the table.

If the database or table does not exist or no data is displayed contact Emerson Automation Solutions technical support to troubleshoot and correct these issues.

## SQL Server Considerations

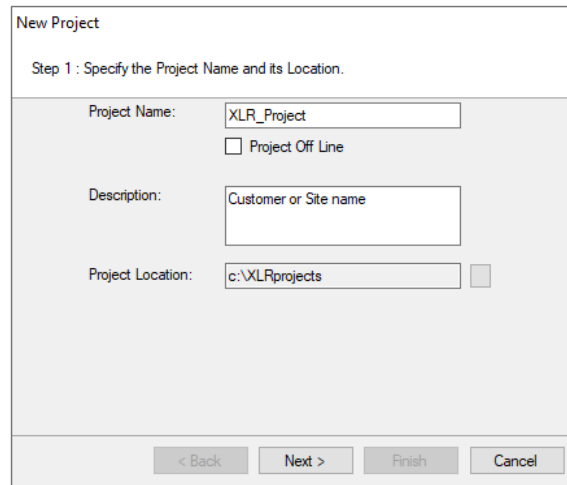
When using SQL Server there are some things to take into consideration including remote connectivity and user authentication. For information on what to consider, see the technical note: How to Configure Microsoft SQL Server.

## Create a Project

From the **XLReporter Project Explorer** select **File, New** to start the **Project Wizard**. This will give step-by-step instructions on creating a project

### Step 1

- Enter a **Project Name** and **Description** (optional).



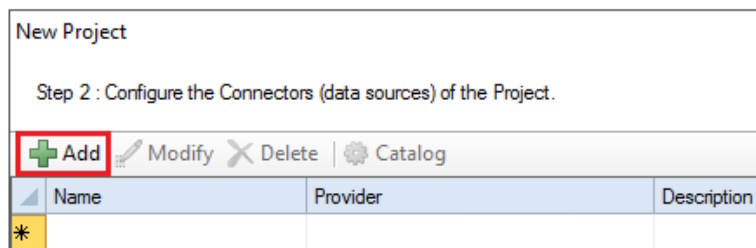
The screenshot shows the 'New Project' dialog box with the following fields and options:

- Project Name:** XLR\_Project
- Project Off Line
- Description:** Customer or Site name
- Project Location:** c:\XLRprojects

Buttons at the bottom: < Back, Next >, Finish, Cancel

### Step 2

- Configure the data connector, click **Add**

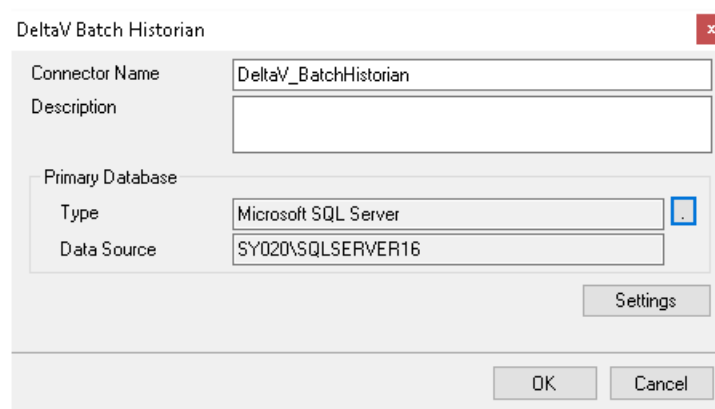


The screenshot shows the 'New Project' dialog box with the following options and table:

- + Add** (highlighted with a red box)
- Modify
- Delete
- Catalog

Name	Provider	Description
*		

Select **Emerson Automation Solutions, DeltaV Batch Historian**.

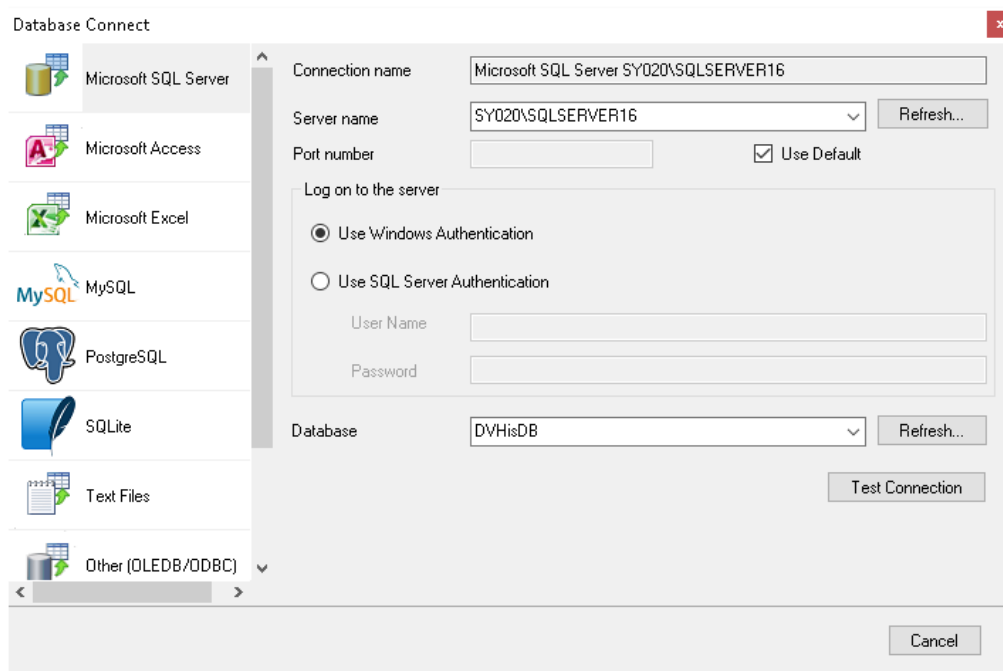


The screenshot shows the 'DeltaV Batch Historian' dialog box with the following fields and options:

- Connector Name:** DeltaV\_BatchHistorian
- Description:**
- Primary Database:**
  - Type:** Microsoft SQL Server
  - Data Source:** SY020\SQLSERVER16
- Settings
- OK
- Cancel

Under **Primary Server**, click the browse pushbutton (...) to connect to the database.

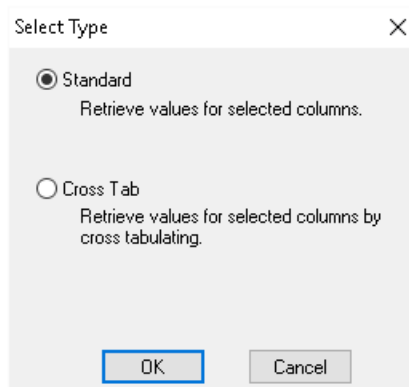
- Select Microsoft SQL Server.
- Set **Server name** to the SQL Server instance where the DeltaV Batch Historian is configured.
- Set the **Log on to the server** to *Use Windows Authentication*.
- For **Database**, select *DVHisDB*.



Click **Test** to verify the settings.

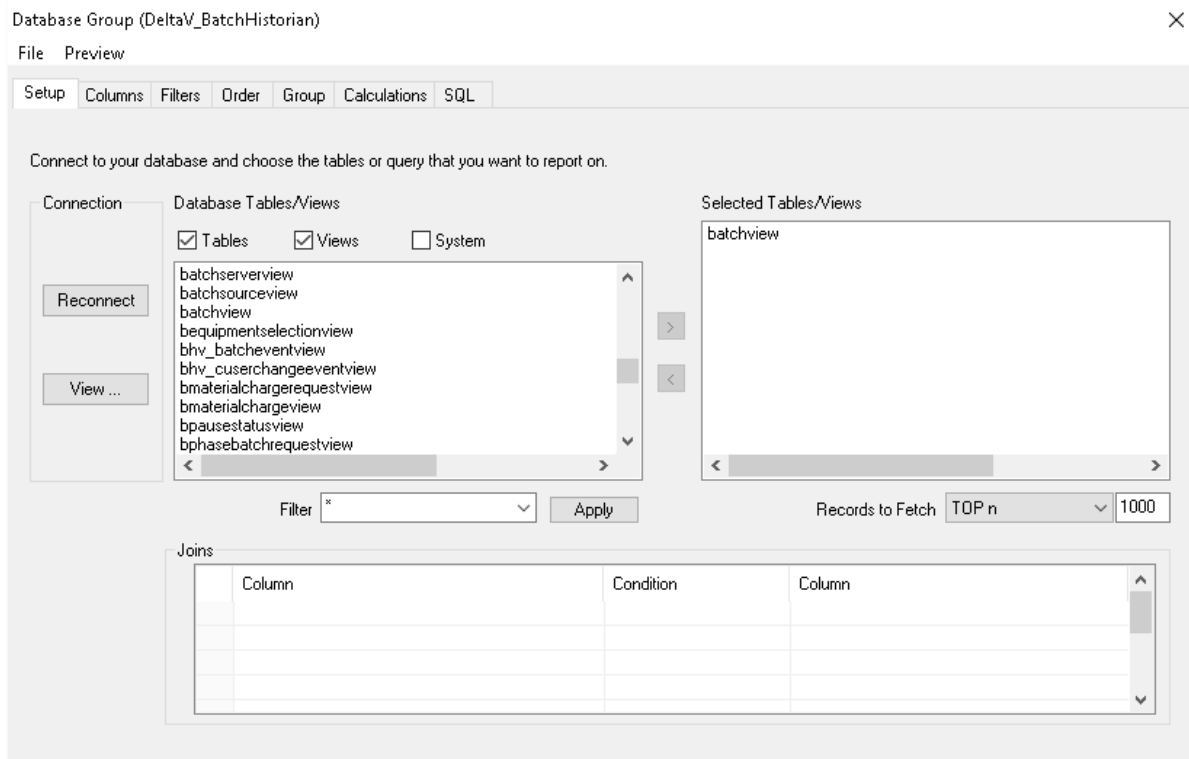
### Verify Data Communication

To verify communication with the DeltaV Batch Historian, open the **Project Explorer** and select the **Tools** tab. Open **Connector Groups**. Select your Batch Historian connector and then select **Add**.

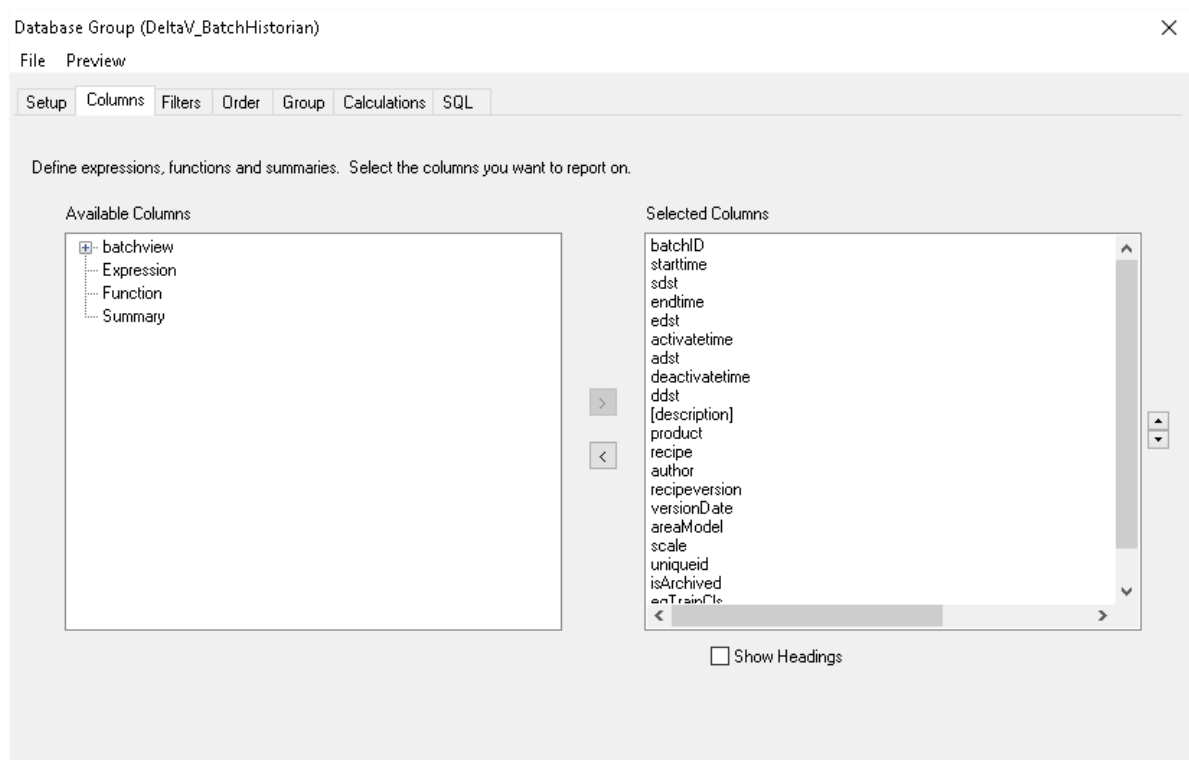


Set the **Type** to *Standard* and click **OK**.

On the **Setup** tab,



- Under **Database Tables/Views** check *Views*.
- In the list select *batchview* and add it to the **Selected Tables/Views**.
- Set **Records to Fetch** to *Top n* and the value to *1000*.



Under the **Columns** tab, in **Available Columns**, double click *batchview* to add all the columns from the view to the **Selected Columns** list.

To retrieve data, select **Preview**. In the **Preview** window click **Refresh** to view data. The first (up to) 1000 batch records should be displayed.