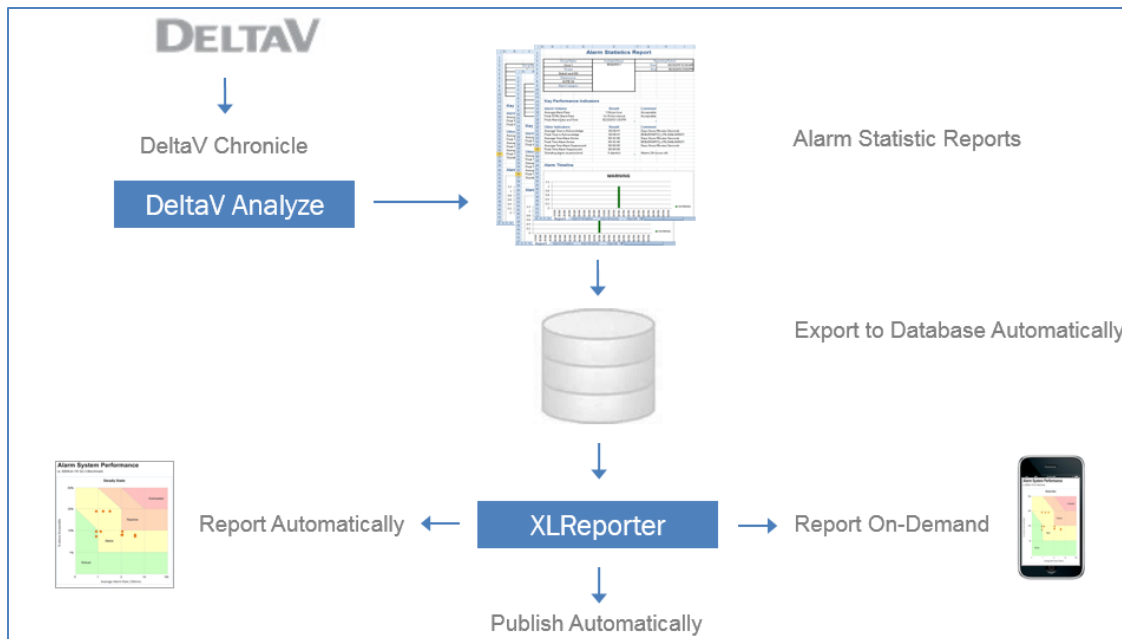


Using XLReporter with DeltaV Analyze

Overview

To extend the reporting capabilities of DeltaV Analyze and provide alternative publishing formats, **XLReporter** automatically historicizes the content of the DeltaV Analyze Alarm Statistic reports to a database. The award-winning report engine of XLReporter processes the database data to provide new information about the alarm reporting system.

Reports are distributed by email, FTP, file server and printers. By enabling XLReporter's Web Portal, reports are accessed from any device supporting a web browser such as a smart phone or tablet.



Prerequisites

Verify Files

Verify that DeltaV Analyze is producing Excel workbooks and make a note of the folder(s). It is suggested that a report is generated every day for each area/operator position.

Microsoft SQL Server

DeltaV Analyze installs a copy of SQL Server which can be used to receive the exported data. Any local or networked SQL Server 2008 or above is also supported.

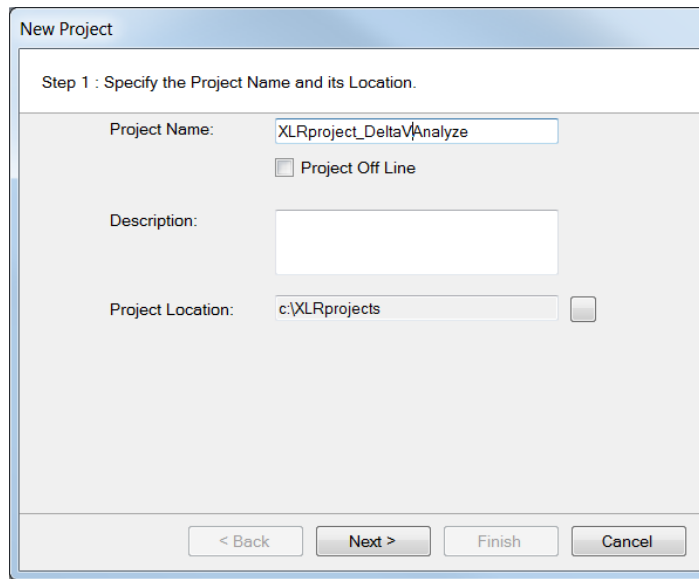
To create a database in SQL Server, refer to the document **“Technical-Note-How-To-Configure-SQL-Server”**

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

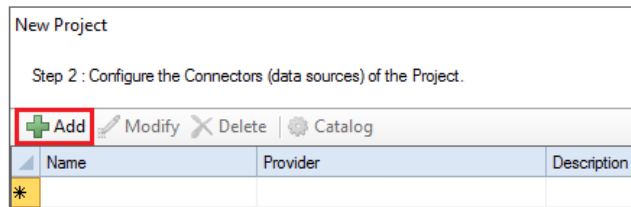
Step 1

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



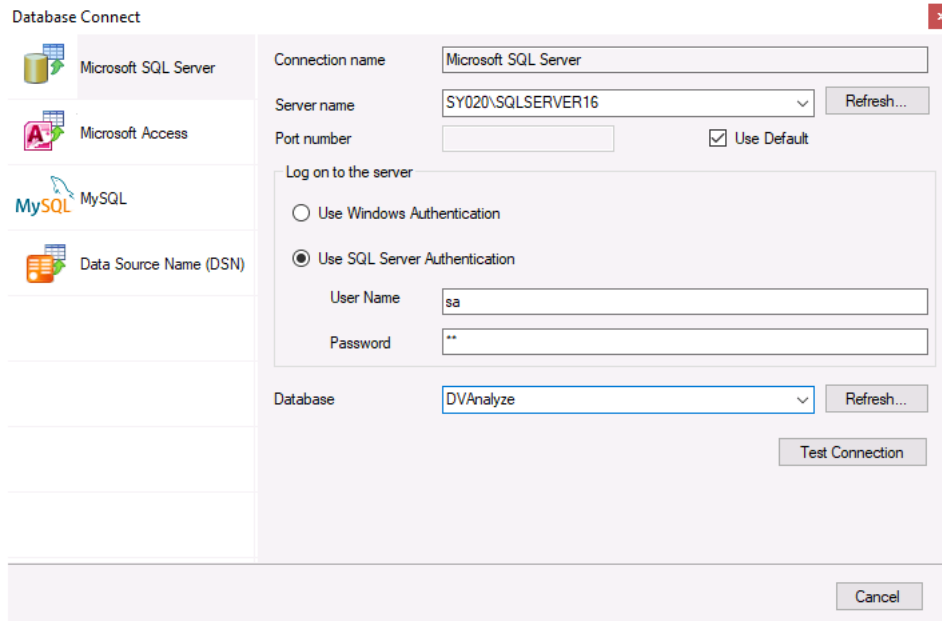
Step 2

- Configure the data connector for DeltaV Analyze, click **Add**



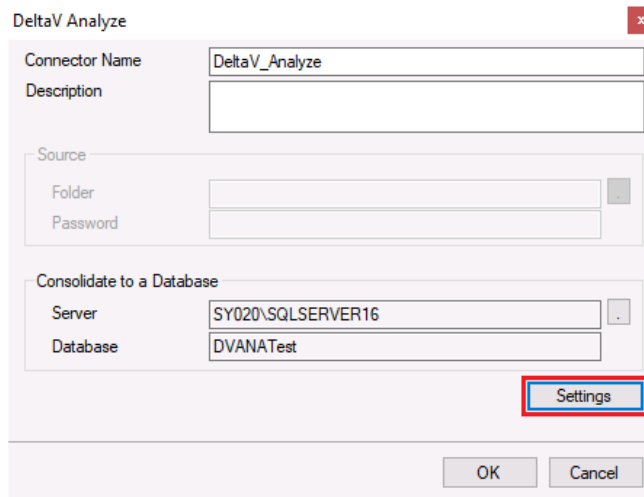
Expand **Emerson Automation Solutions** and select **DeltaV Analyze**.

Under **Consolidate to a Database**, for **Server**, click the browse pushbutton ([...]).



- On the left, select **Microsoft SQL Server**.
- On the right, for **Server name**, select the SQL Server instance.
- Under **Log on to the server** select the appropriate authentication method.
- For **Database**, select the database.

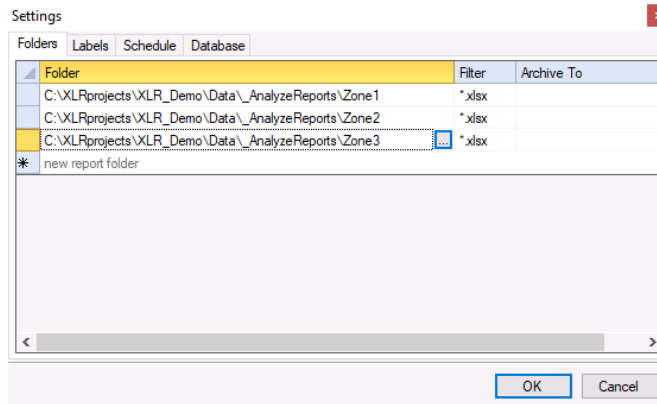
Click **Test Connection** to verify the connection and return to the main Connector settings.



In the main Connector settings, click the **Settings** button.

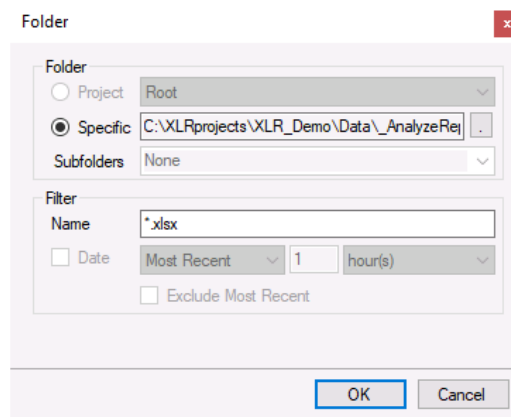
Folders Tab

The **Folders** tab is where the DeltaV Analyze Alarm Statistic reports are saved.



The **Archive To** column is the folder the files will be moved to after they have been processed. If this is left blank, **XLReporter** keeps a track what has been processed by maintaining a `_lastprocessed.ini` file.

To add a folder, click the first empty row under the Folder column and click the browse pushbutton ([...]).

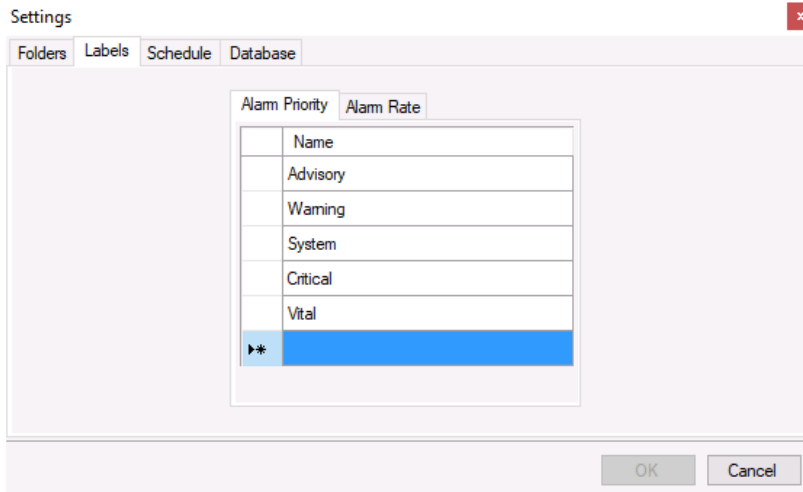


In the **Folder** section,

- Click the browse pushbutton ([...]) for **Specific** and select the folder containing the Alarm Statistic reports.
- Click OK to add this folder to the list.

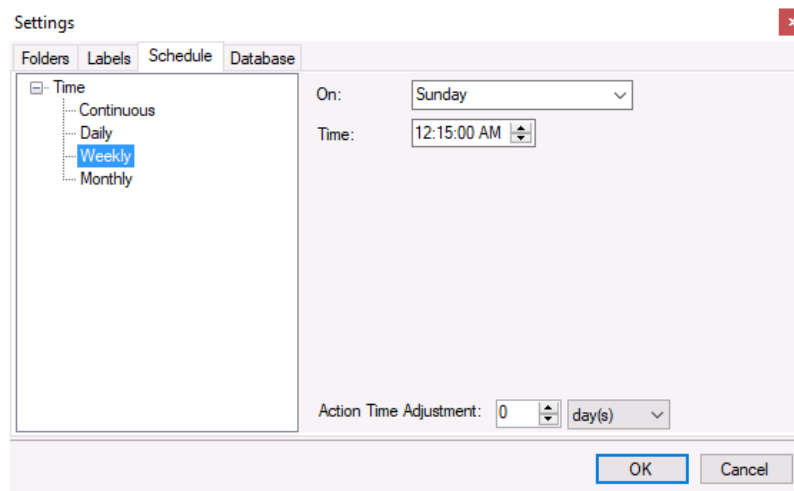
Label Tab

The **Labels** tab contains the labels of **Alarm Priority** and **Alarm Rate** that are used in the DeltaV system. It is important that the text specified is identical to that specified in DeltaV.



Scheduled Tab

The **Schedule** tab indicates the frequency at which **XLReporter** monitors the **Folders**. Any new files are processed by exporting their data to the database.



When configuring the schedule consider when the DeltaV Analyze reports are generated to ensure this schedule runs after workbooks are generated.

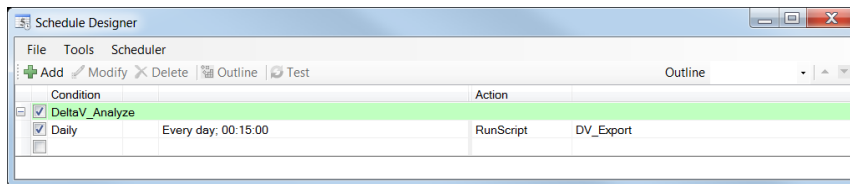
- Click **OK** to save the settings.
- Click **OK** to save the connector.

On completion of the setup of the data connector, the tables in the database are automatically created. In addition, library templates are ready for On-Demand reporting once the database has been populated with data (see Backfilling the Database).

Backfilling the Database

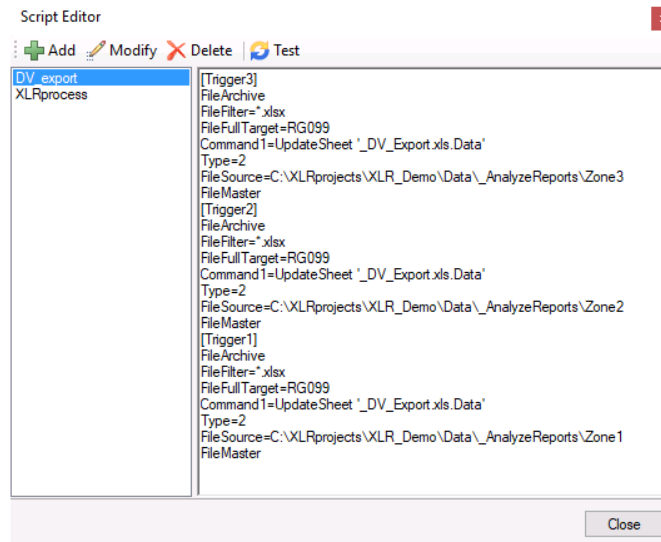
If XLReporter has been installed on an existing system where Alarm Statistic reports already exist, these reports from the past can also be included in the database by running a schedule script

The settings from the Schedule tab of the last section can be viewed in the Schedule Designer. From the **Project Explorer**, under the **Project** tab, select **Schedule, Designer**.



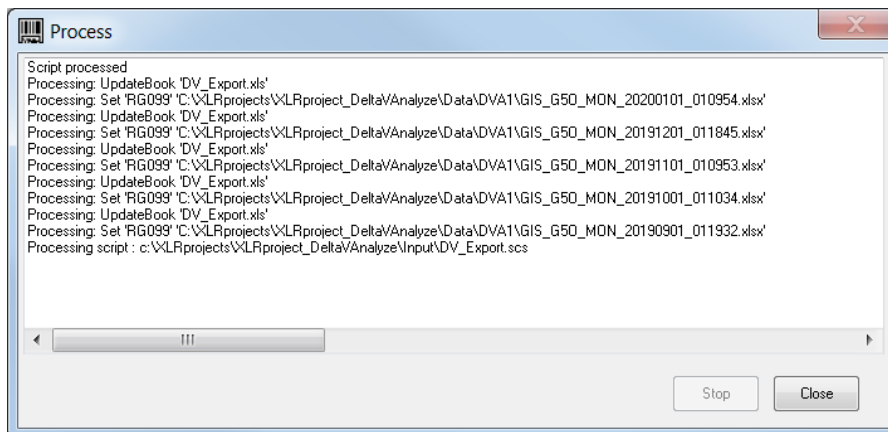
This schedule runs periodically, executing the script *DV_Export* which performs the transfer from the Alarm Statistic reports to the database. Manually executing the script will process the existing reports thus backfilling the database with past data.

In the **Schedule Designer** select **Tools, Script Editor**. Select *DV_export* from the left side



- Click **Test**.

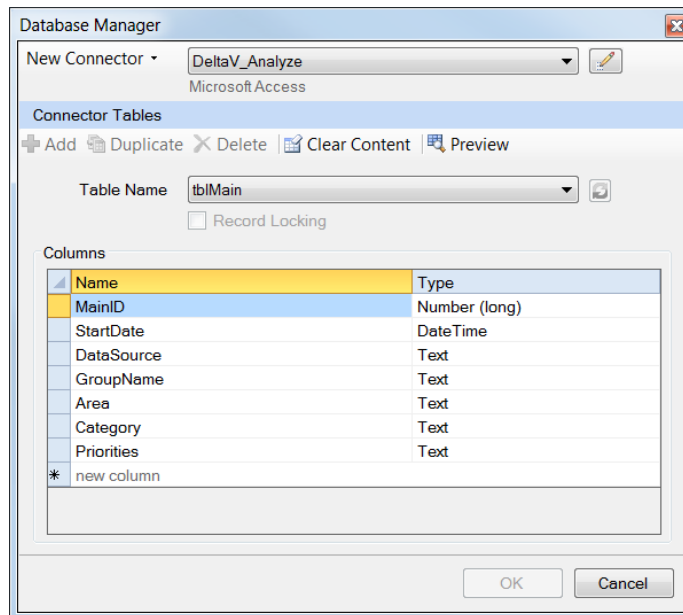
The script will extract data from the DeltaV Analyze workbooks in the folders configured and consolidate them to the database. Keep in mind that it will only process the first Analyze report when running the script on an trial registration.



Note that the evaluation copy of XLReporter will only process **one** report

Verify Database

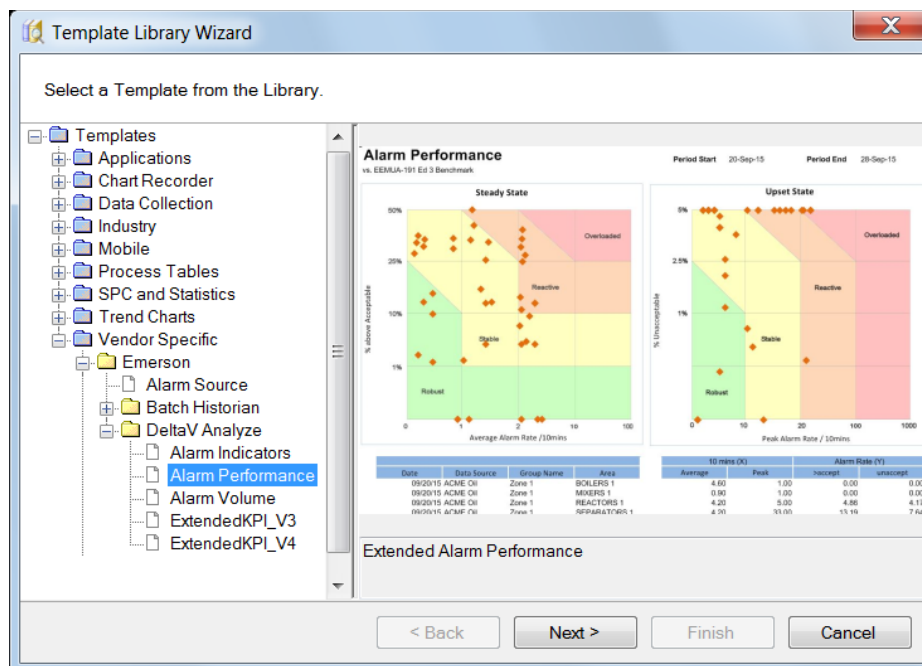
The exported data in the database can be verified using the **Database Manager**, From **XLReporter's Project Explorer**, under the **Tools** tab, select **Database, Manager**.



- For **Table Name** select *tblMain*
- Click **Preview** and confirm that there is a record for each file exported.

Library Templates

XLReporter provides library templates specifically designed for DeltaV Analyze data. From the **Project Explorer**, under the **Home** tab select **Template, Library**.



To view the available library templates for DeltaV Analyze, expand **Templates, Vendor Specific, Emerson, DeltaV Analyze**.

These templates can be used out of the box or can be customized for additional information using XLReporter's Design Studio.