

## Using XLReporter with GE Digital iFIX Historical values

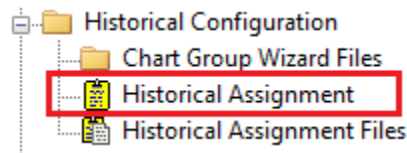
### Overview

**XLReporter** takes historical values from GE Digital iFIX Historical values to populate workbooks, periodically or on event, without needing Excel. The award-winning reporting software turns raw data into industrial metrics which are used for compliance, regulatory, improvements and operations.

Complete reports are distributed automatically by email, FTP, file server and printers. With the Web Portal, reports are viewed or produced on-demand from any device supporting a web browser such as a mobile phone, tablet.

### Set up GE iFIX History

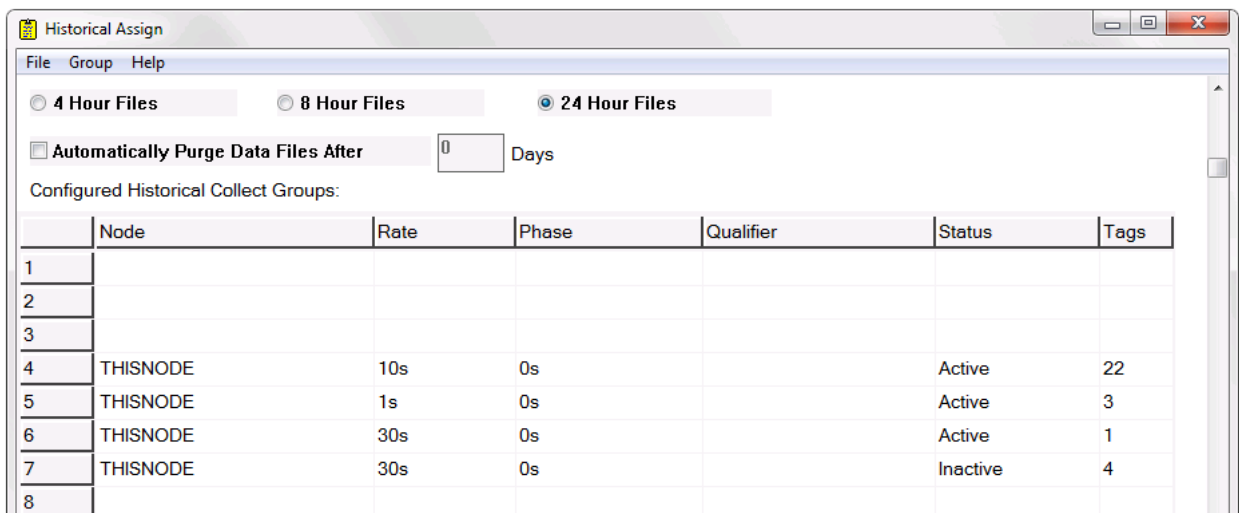
To set up iFIX history logs, open **iFIX Workspace**, from the **iFIX** program group.



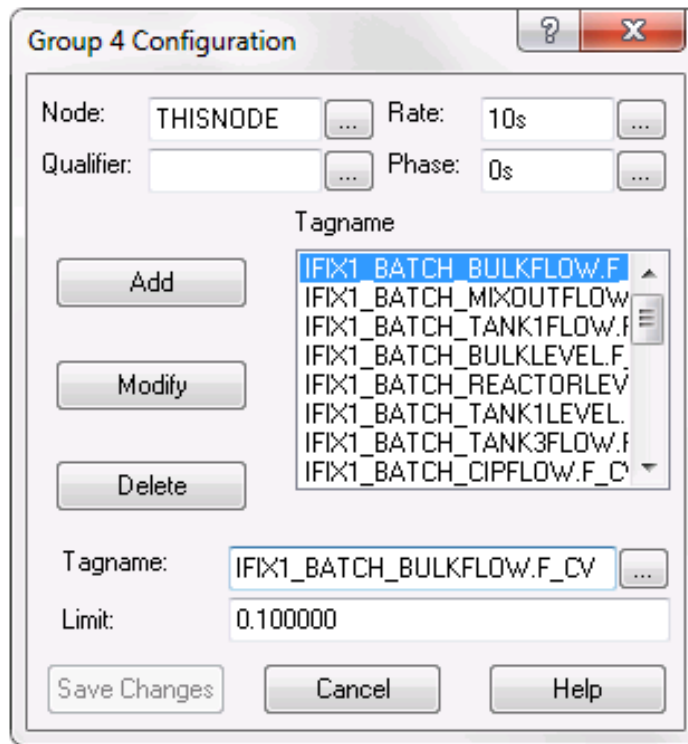
Expand **Historical Configuration** and click on **Historical Assignment**.

If the Historical Assignment does not open, the SIMS required for the logger are not installed. See GE Knowledgebase - KB15171 for more information.

In **Historical Assignment**,



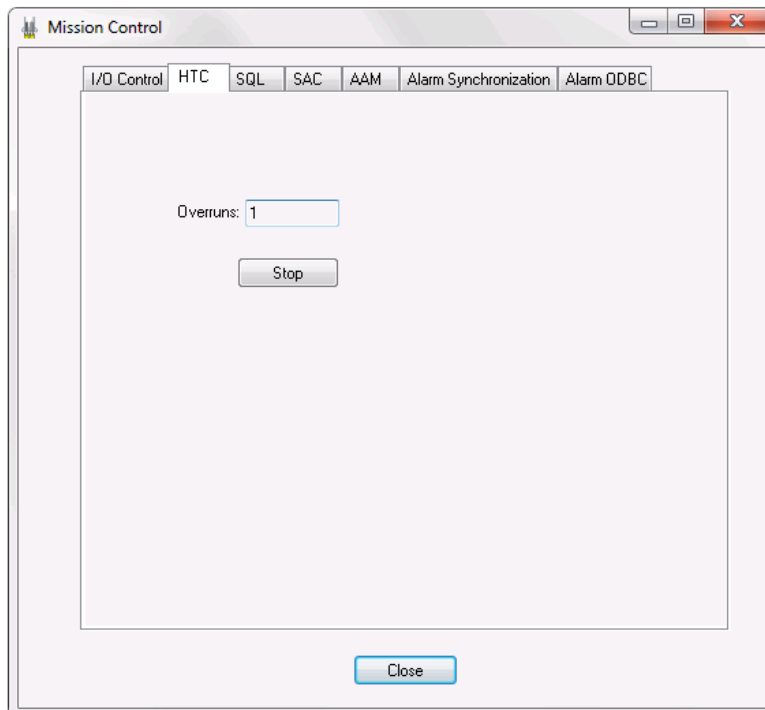
- Select how often a new file is created (\*.h04 (4 hour files), \*.h08 (8 hour files) or \*.h24 (24 hour files))
- Double-click on an open row to configure a new group.



- Add each tag to collect.
- Specify how often to collect values for the group.

## Start Historical Data Logs

In **iFIX Workspace**, open **Mission Control**.



In **Mission Control**, under the **HTC** tab, click **Start**.

# 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 elements:

- Step 2 : Configure the Connectors (data sources) of the Project.**
- Buttons: + Add (highlighted with a red box), Modify, X Delete, Catalog
- Table with columns: Name, Provider, Description
- Table content: \*

## Select **GE Digital, iFIX Historical values (classic)**

The screenshot shows the 'iFIX Historical values (classic)' dialog box with the following fields and options:

- Connector Name:** iFIX\_HistoryClassic
- Description:** (empty)
- iFIX Paths:**
  - Installation:** C:\Program Files (x86)\Proficy\Proficy iFIX
  - History Data:**  Default,  Specific

Buttons at the bottom: OK, Cancel

Set **Install** to the directory where iFIX is installed.

For the **History Data** path, specify **Default** to use the **Historical Data** path as defined in the iFIX System Configuration Utility or **Specific** to use a specific folder on the local system or network. Note, the **Specific** path should point to the folder containing subfolders for every node with historical data.

## Verify the Data Connector

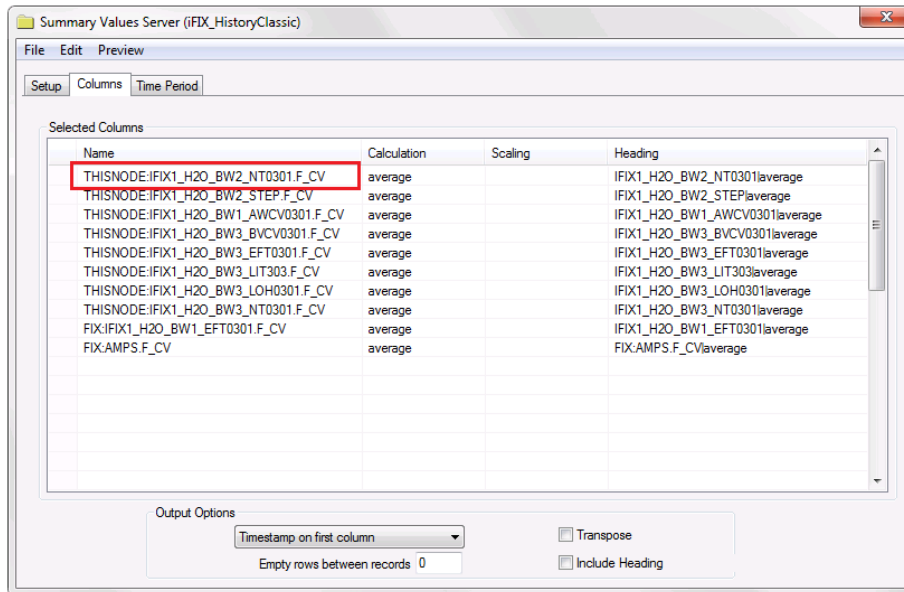
**XLReporter** retrieves data from the **Data Connector** using a **History Group**.

From the **XLReporter Project Explorer** select, **Tools, Connector Groups**

Select the *GE iFIX Historical values (classic) connector* and then select **Add**.

- Set the **Type** *Summary Values from Server* and click **OK**.

On the **Columns** tab of the group, select the tag **Name(s)** and **Calculation(s)**.



Select **Preview**, pick a *Start* date and click **Refresh**.

## Catalog of History Tags

When browsing online for all the tags configured in the iFIX system are presented regardless of whether logged historically or not. A catalog can be easily created that contains only the tags being historically logged.

Open **iFIX WorkSpace**, from the **iFIX** program group and open **Historical Assignment**.

- Select **File, Save As**.
- Set **Location** to the **iFIX** folder located in the **Data** folder of your current **XLReporter** project. The file **Name** must start with *IFIX\_* and have a *.csv* file extension.

From the **Project Explorer**,

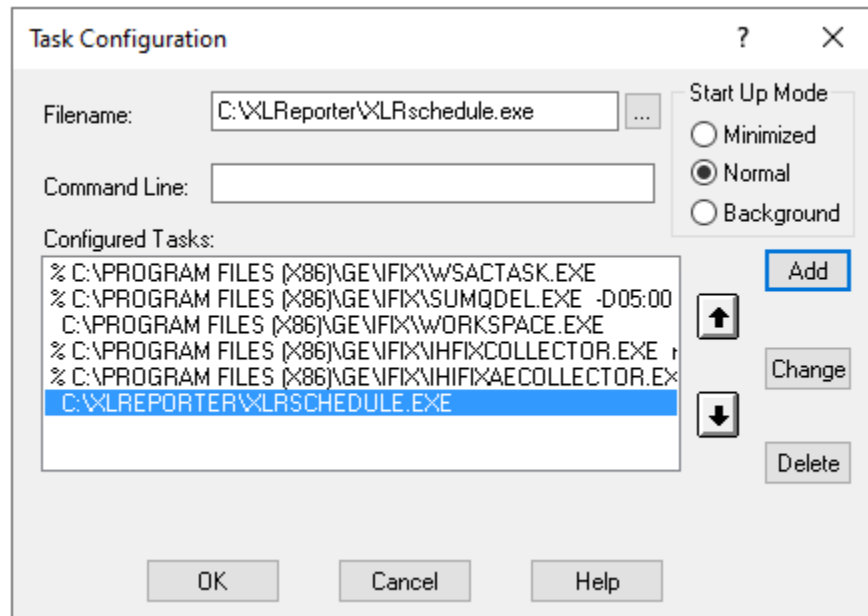
- From the **Data** tab open **Connectors**.
- In **Connectors**, select the iFIX history connector previously configured.
- Click **Modify**.
- Click **OK** to save.

Now, when browsing for tags in the connector group, under **Catalog** there is a catalog listed for the node of the tags.

Select this catalog and all the historically logged tags are listed.

## Start the Scheduler from iFIX

Open the **System Configuration (SCU)** from the **iFIX** program group. Select **Configure, Tasks**.



- For **Filename** browse and select **XLRschedule.exe** from the **XLReporter** installation folder (*C:\XLReporter* by default).
- Set **Start Up Mode** to *Normal*.
- Click **Add**.
- Use the down arrow to move this to the bottom of the **Configured Tasks** list.
- Click **OK**.

Save and close the SCU. The next time iFIX is started, **XLReporter's Scheduler** will start with it.