

Using XLReporter with Point of View History (Database)

Overview

XLReporter takes historical values directly from the Indusoft Point of View automatically 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.

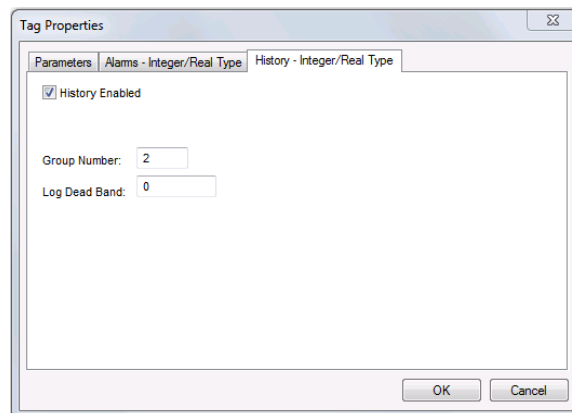
Distribute the reports by email, FTP, file server and printers. Enable **XLReporter's** Web Portal and access reports from any device supporting a web browser such as a smart phone or tablet.

Set up Point of View

Enable Historical Logging

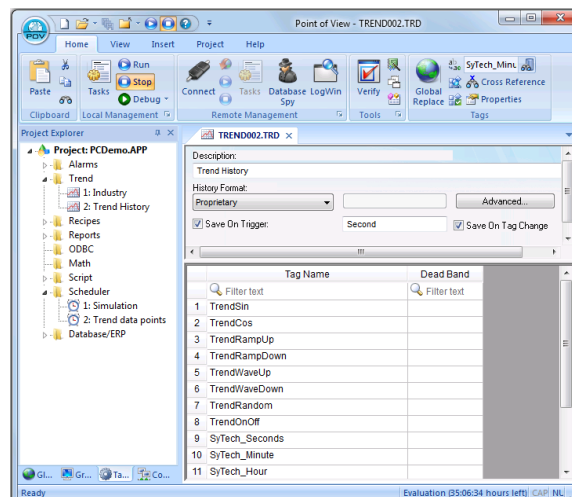
Each integer and real type tag in the tags database has several properties in addition to its actual value. You can set these properties by using the **Project Tags** datasheet, the **Properties** command on the ribbon, or the **Tags Database** functions.

For each tag, in **Tag Properties**, under the **History – Integer/Real Type** tab,



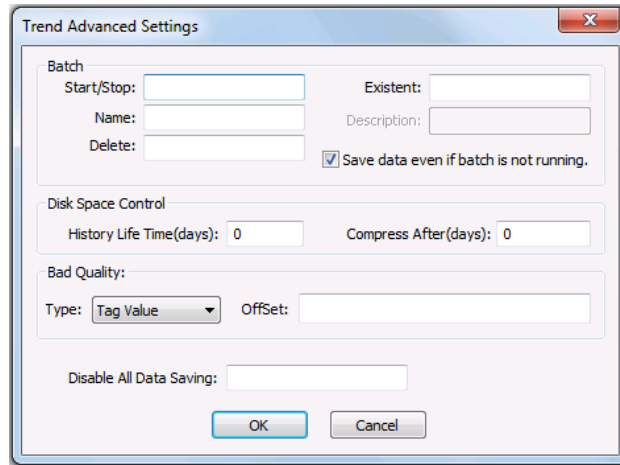
- Check **History Enabled**.
- The **Group Number** is the trend group to which the project tag is assigned to. Set this accordingly.

The trend folder enables which tags have the values stored. To create a new trend file select **Tasks**, then right click **Trend** and select **Insert**.



Assign the tags.

Click the **Advanced...** option and set the **History Life Time (days)** option.

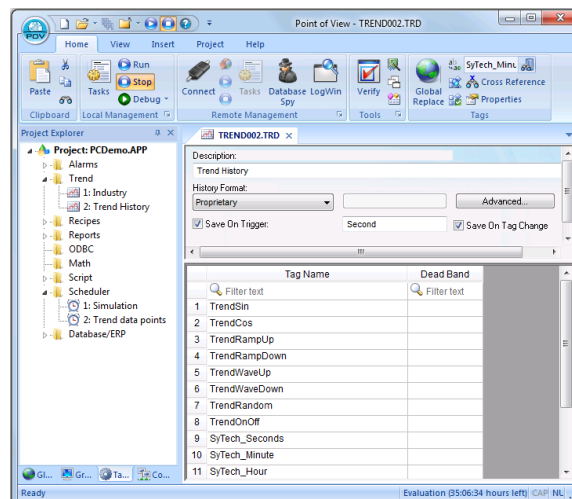


This determines how often Point of View deletes the trend files. Use 0 to keep all historical files.

Enable Historical Database Log

To retrieve historical data via trends logged to a relational database, create a new trend file.

Select **Tasks**, then right click **Trend** and select **Insert**.



Assign the tags.

The trend file can be logged to an external database. Change the **History Format** to *Database*. The default name of the **Table** created is the name of the Trend file.

For example the trend file name above is *TREND002.TRD*.

The table name created is *TREND002*. User can change the table name.

This table is setup with each tag as its own column. The timestamp column is *Time_Stamp* and it is stored in local time.

Prerequisites

Verify Database

To verify the database open the tool provided by the database vendor that allows access to tables. If data is logged to SQL Server or SQL Server Express, this is the **Microsoft SQL Server Management Studio**.

Open **SQL Server Management Studio** and connect to the SQL Server or SQL Server Express instance set up for history data from Point of View.

Expand **Database** and then the database configured and expand **Tables**. Right-click table configured and choose **Select Top 1000 Rows**.

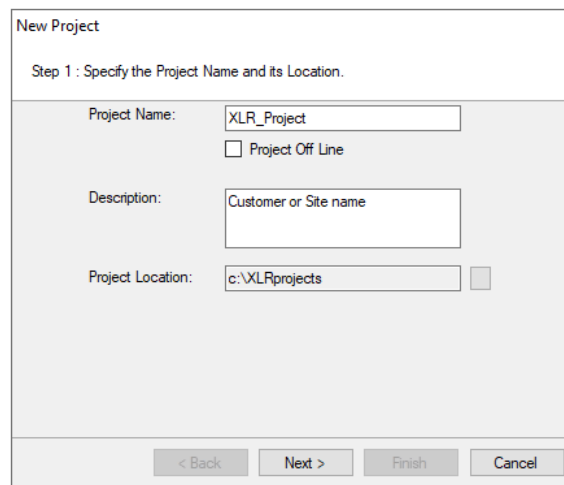
If no data is returned contact Indusoft technical support and correct these issues.

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).



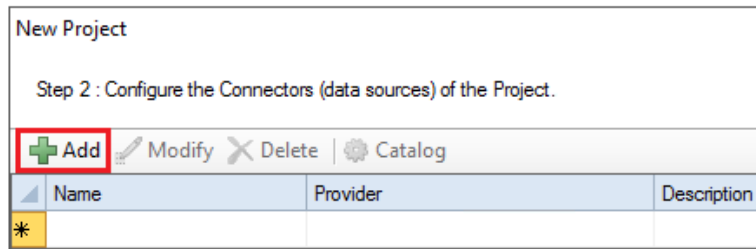
The screenshot shows a dialog box titled "New Project" with the subtitle "Step 1 : Specify the Project Name and its Location." The dialog contains the following fields and options:

- Project Name:** A text box containing "XLR_Project".
- Project Off Line:** An unchecked checkbox.
- Description:** A text box containing "Customer or Site name".
- Project Location:** A text box containing "c:\XLRprojects" with a browse button (represented by a small square icon) to its right.

At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

Step 2

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



Select **Indusoft, Point of View Historical Values (OLE DB/ODBC)**

The connector requires a **Primary Database**. Click the browse pushbutton ([...]) to connect to the database where Point of View is logging the historical data.

Under **Table/Column**, set **Table** to the table containing the Point of View historical data and **Date Column** to *Time_Stamp*.

Verify Data Communication

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

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

Select your *Point of View History connector* and then select **Add**.

- Set the **Type Raw Values** and click **OK**.

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

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