

## Using XLReporter with Point of View History (OPC HDA)

### Overview

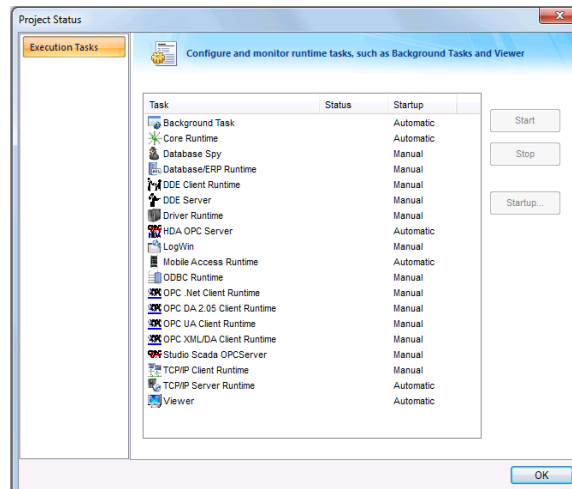
**XLReporter** takes historical values directly from the Indusoft Point of View automatically to populate workbooks, periodically or on event, without needing Excel. The award-winning reporting software turns raw data into industrial metrics which are used for compliance, regulatory, improvements and 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 OPC HDA Server

To enable the Point of View OPC-HDA Server, open the project. Select the **Local Management, Tasks** from the **Home** tab.

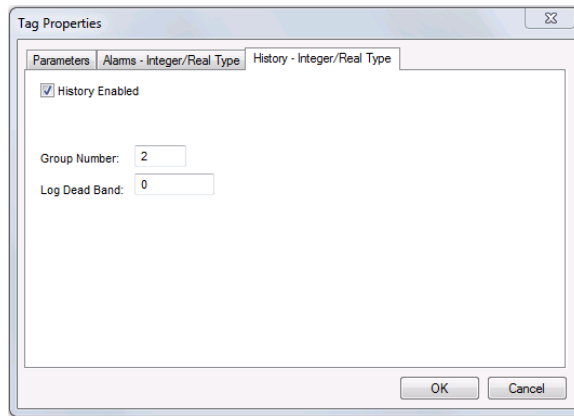


- Under the **Task** column, select **HDA OPC Server**.
- Set **Startup** to *Automatic*.

#### Enable Historical Logging

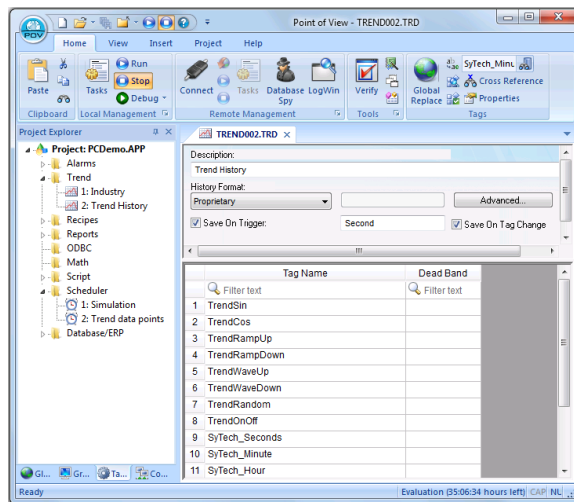
Each integer and real type tag in the tags database has several properties in addition to its actual value. You can set these properties by using the **Project Tags** datasheet, the **Properties** command on the ribbon, or the **Tags Database** functions.

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



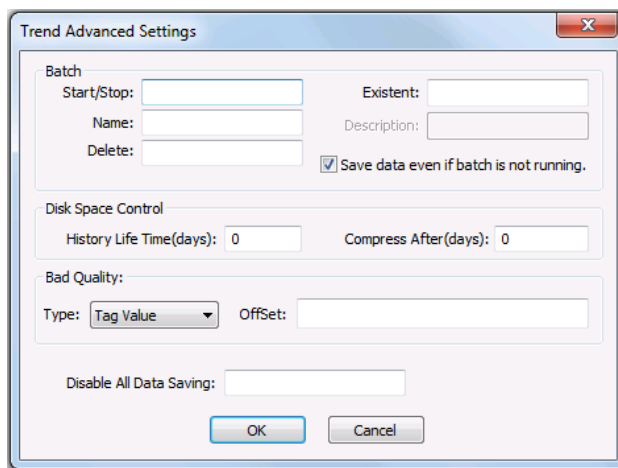
- Check **History Enabled**.
- The **Group Number** is the trend group to which the project tag is assigned to. Set this accordingly.

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.



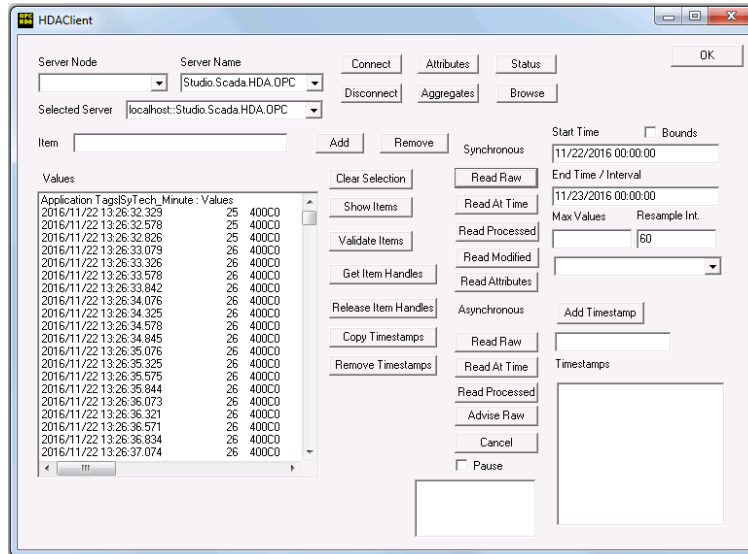
This determines how often Point of View deletes the trend files. Use 0 to keep all historical files.

# Prerequisites

## Verify Communication

Communication between the OPC server and an OPC client must be verified. **XLReporter** provides an independent OPC HDA client to verify connectivity and data retrieval from any OPC HDA server. This client is found on **XLReporter's** product CD under **Tools, OPC, OPC\_HDA**. It can also be downloaded from [www.SyTech.com](http://www.SyTech.com).

To run, double-click **SampleClientHDA.exe**.



Set **Server Name** to Studio.Scada.HDA.OPC (the Point of View OPC HDA server) and click **Connect**.

Click **Browse** to open the **Browse Dialog** window.

The easiest way to get a list of tags is to set **OPCHDA\_BROWSETYPE** to **OPCHDA\_FLAT**. Choose each tag to test by selecting it and clicking **Add**. When complete, click **Done** to return to the **HDA Client** window.

Click **Show Items** to display the selected tags in the left pane window. Click **Validate Items** then **Get Item Handles** to register these tags with the server.

Enter the **Start Time** and **End Time**. Note this is in UTC(Universal Time Clock) and click **Read Raw**. The raw values for each selected tag will appear on the left along with a timestamp and quality.

To read processed data, click **Aggregates**, select the appropriate aggregate (e.g., maximum, minimum, etc.) and click **Read Processed**. One minute calculations between the start and end time should appear for each selected tag.

If the client does not respond as described contact Indusoft technical support to troubleshoot 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 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 Indusoft, Point of View Historical Values (OPC HDA)

The screenshot shows the 'Point of View Historical values (OPC HDA)' dialog box with the following fields and options:

- Connector Name:** PointOfView\_History
- Description:** (empty)
- Primary Server:**
  - Server Name:** Studio.Scada.HDA.OPC
  - Node:** local
  - Test Connection button
- Secondary Server:**
  - Server Name:** Studio.Scada.HDA.OPC
  - Node:** local
  - Test Connection button
- Buttons: OK, Cancel

The connector requires a **Primary Server** which, by default has **Node** set to *local*.

## Remote Communication to Point of View

If Point of View is installed on a workstation remote from the PLC then set the **Node** to an item in the dropdown list or enter an *IP address*.

The workstation must also have the OPC core components installed. To determine if the core components are installed verify the following file exists:

- 64 - bit OS C:\Windows\SysWow64\OPCEnum.exe
- 32 - bit OS C:\Windows\system32\OPCEnum.exe

If the components are not installed then they are provided in the tools folder of the installation or from [www.opcfoundation.org](http://www.opcfoundation.org).

## 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**.