

## Using XLReporter with KEPServerEX Local Historian

### Overview

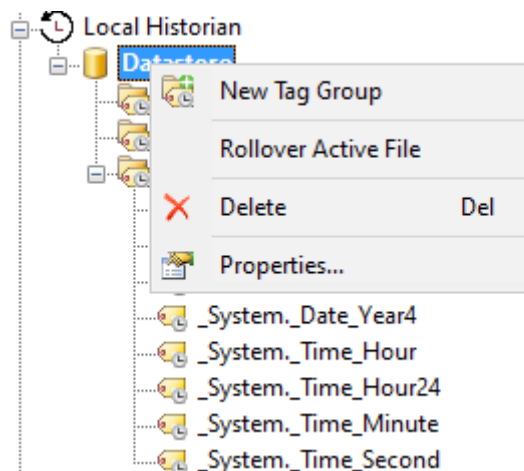
**XLReporter** takes historical values directly from the Kepware Local Historian automatically to populate workbooks, periodically or on event, without needing Excel. The award-winning reporting software turns raw data into industrial metrics which are used for compliance, regulatory, improvements and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

### Setup KEPServerEX Local Historian

#### Add Data Points to Log

Open the **KEPServerEX Configuration** from the **Kepware** program group.

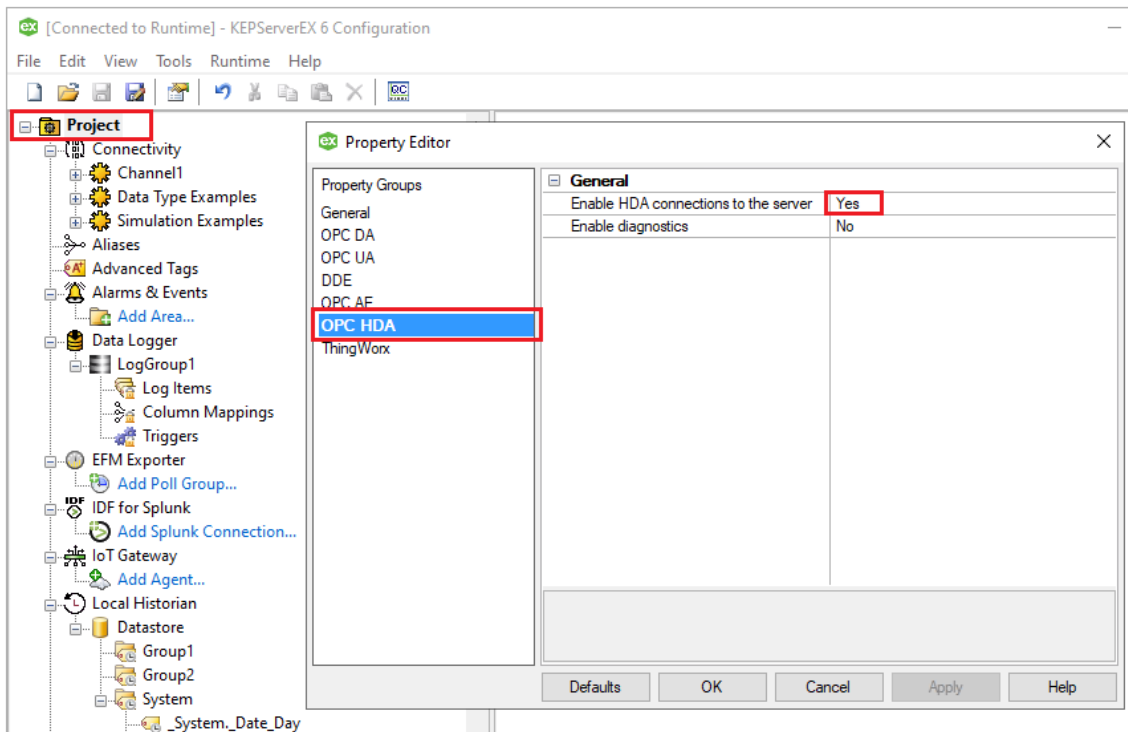


Expand **Local Historian**, right click **Database** and select **New Tag Group**.

- Enter a **Name**
- Select tags to log

## Enable OPC HDA connections

In **KEPServerEX Configuration** right click **Project**, select **Properties**.



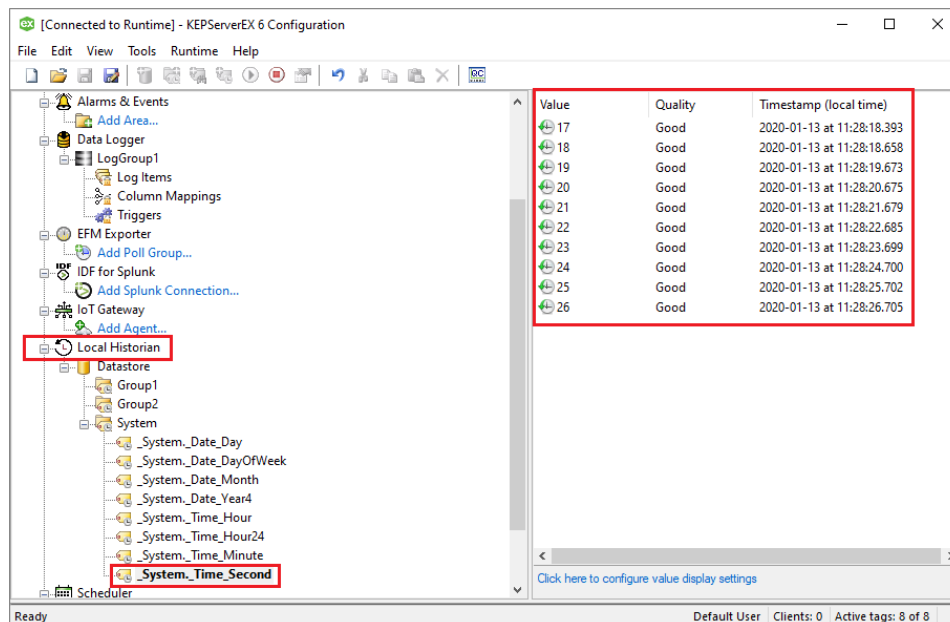
In the **Property Editor** select **OPC HDA**.

- Set **Enable HDA connections to server** to **Yes**.

## Prerequisites

Verify Database

Open the **KEPServerEX Configuration** from the **Kepware** program group.



Expand **Local Historian, Database** and a specific tag group.

- Select a tag and verify it has data on the right side.

If no data is returned contact Kepware 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." It contains three input fields: "Project Name" with the text "XLR\_Project", "Description" with the text "Customer or Site name", and "Project Location" with the text "c:\XLRprojects". There is a checkbox labeled "Project Off Line" which is unchecked. At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

### Step 2

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

The screenshot shows a dialog box titled "New Project" with the subtitle "Step 2 : Configure the Connectors (data sources) of the Project." It features a toolbar with a red box around the "+ Add" button, followed by "Modify", "Delete", and "Catalog" buttons. Below the toolbar is a table with three columns: "Name", "Provider", and "Description". The first row is empty and has a yellow asterisk "\*" in the "Name" column.

Name	Provider	Description
*		

Select **Kepware, KEPServerEX Local Historian**

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

### Remote Communication to KEPServerEX

If KEPServerEX 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

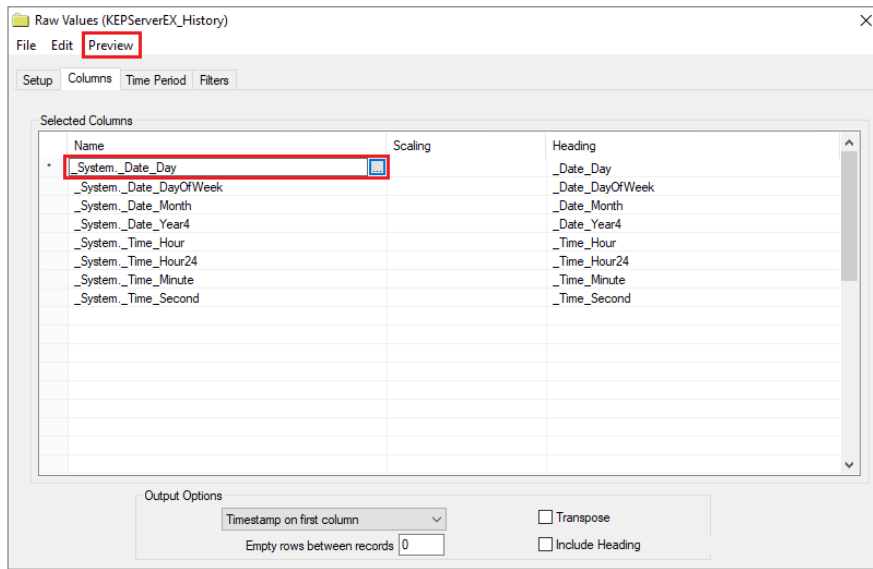
**XLReporter** retrieves data from the **Data Connector** using a **History Group**.

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

Select your *KEPServerEX 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**.