

Using XLReporter with FactoryTalk View SE Data Agent

Overview

XLReporter takes historical values from FactoryTalk Historian SE via the FactoryTalk View SE Data Agent 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 or tablet.

Set up FactoryTalk View SE Data Agent

The FactoryTalk View Data Agent can be installed for FactoryTalk View SE version 10 and above on a FactoryTalk View SE stand-alone system, the FactoryTalk View SE server or any FactoryTalkView SE client. To obtain the FactoryTalkView SE Data Agent installation media, please contact SyTech, Inc. You must provide your FactoryTalk View SE product serial number in order to be eligible.

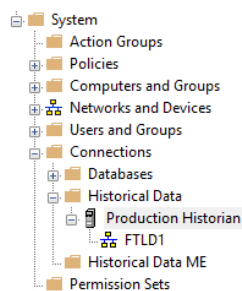
After installation, the configuration for Data Agent must be updated so that any machine on the network can request data. To do so, open *RA.DataAgent.SDK.Service.Host.exe.config* using a text editor like Notepad. This file is typically found in *C:\Program Files (x86)\Rockwell Software\RSView Enterprise\Data Agent SDK*.

In the text file, replace every instance of **localhost** with the IP address of the machine, save the file and close it. After closing it is recommended to restart the **Rockwell Data Agent** Windows Service.

FactoryTalk View SE

For **XLReporter** to collect data through the FactoryTalk View SE Data Agent, the application must be running.

The FactoryTalk View SE Data Agent provides access to any Historian configured as a **Historical Data** connection within the FactoryTalk View Studio.



Windows Firewall

If the Windows Firewall is enabled in the machine where the FactoryTalk View SE Data Agent is running, the Port Number specified in the *RA.DataAgent.SDK.Service.Host.exe.config* must be opened in order to connect.

To do so:

- Open the Windows Firewall. Typically the easiest way to do this is by typing Firewall into the search bar at the bottom left of Windows.
- Click **Advanced Settings**
- Right-click **Inbound Rules** and select **New Rule**.

What type of rule would you like to create?

Program
Rule that controls connections for a program.

Port
Rule that controls connections for a TCP or UDP port.

Predefined:
AllJoyn Router
Rule that controls connections for a Windows experience.

Custom
Custom rule.

- For the rule type select Port and click **Next**.
- For **Protocol and Ports** set **Protocol type** to *ICMPv4* and click **Next**.

Does this rule apply to TCP or UDP?

TCP

UDP

Does this rule apply to all local ports or specific local ports?

All local ports

Specific local ports:
Example: 80, 443, 5000-5010

- Apply the rule to **TCP**.
- For port, select **Specific local ports** and specify the port number as found in the *RA.DataAgent.SDK.Service.Host.exe.config* (this is specified after the IP address and by default is *12344*, e.g., *192.168.1.1:12344*). Click **Next**.
- Leave **Allow the connection** selected and click **Next**.
- Apply the rule for every network type required and click **Next**.
- Give the rule a **Name** and click **Finish**.

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).

New Project

Step 1 : Specify the Project Name and its Location.

Project Name:
 Project Off Line

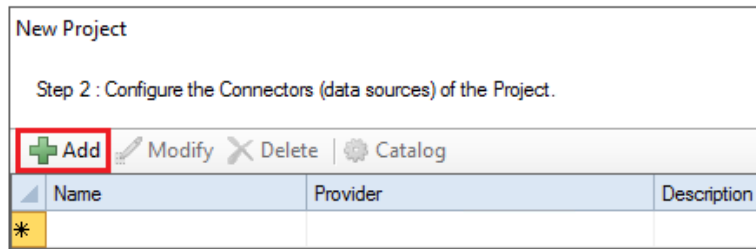
Description:

Project Location:

< Back Next > Finish Cancel

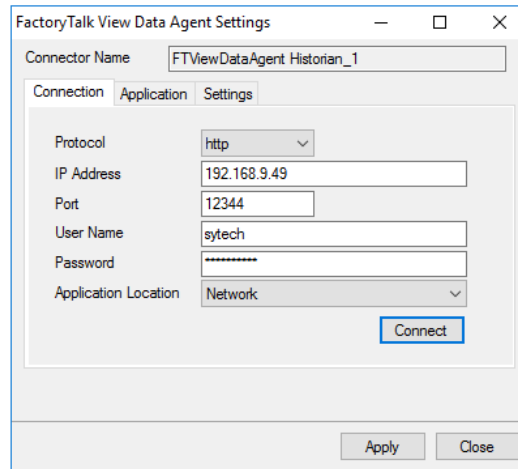
Step 2

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



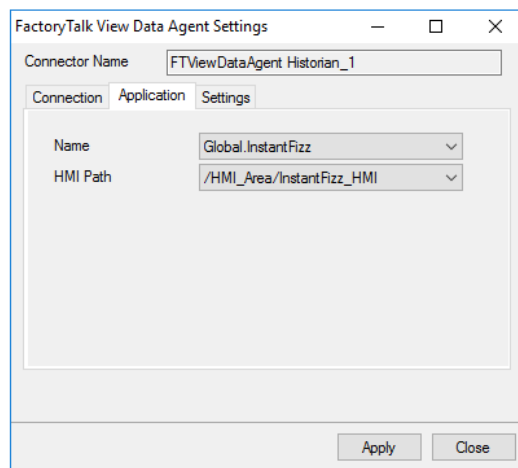
Select **Rockwell Automation, FactoryTalk View Data Agent Historian SE**

Under the **Connection** tab



- Set the **Protocol** to *http* or *https* depending on the security protocol configured.
- Set **IP Address** to the IP address of the machine where the FactoryTalk View Data Agent is installed and running.
- Set **User Name** and **Password** to a valid user name configured in FactoryTalk View SE.
- Set **Application Location** to *Network* or *Local* depending on the location of the FactoryTalk View SE application to retrieve data from.
- Click **Connect**.

Under the **Application** tab



- Set the **Name** to the name of the FactoryTalk View SE application to retrieve data from.
- Set **HMI Path** to the path based on the **Application Name** selected.

Verify the Data Connector

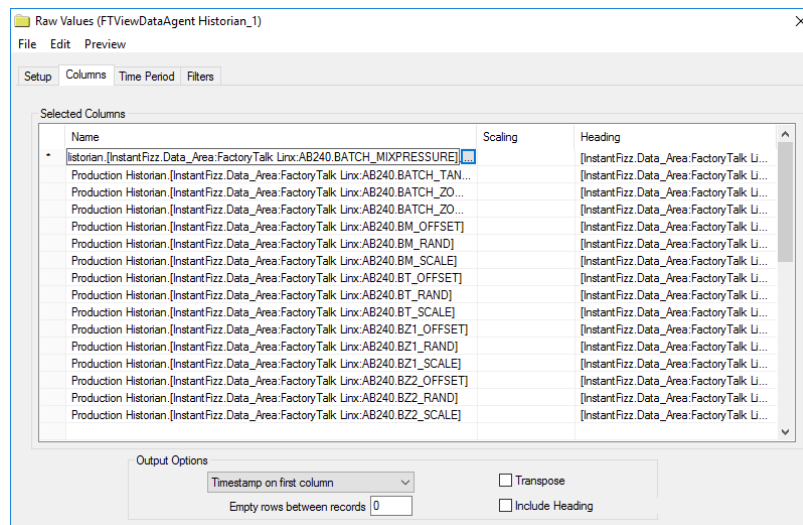
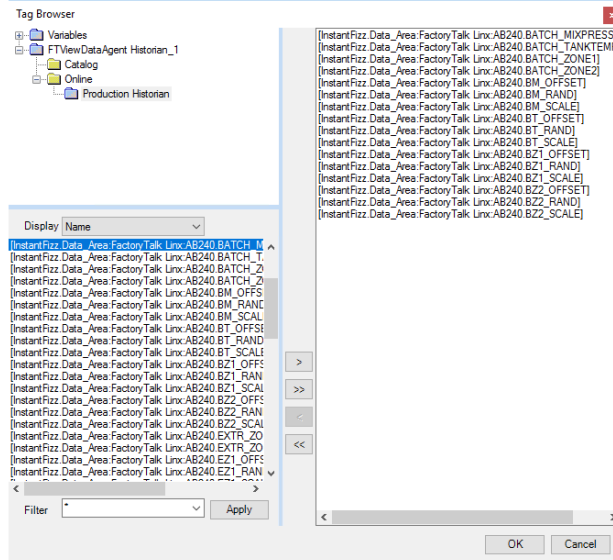
XLReporter retrieves data from the **Data Connector** using a **History Group**.

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

Select the *FactoryTalk View Data Agent Historian SE* 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**.

