

## Using XLReporter with FactoryTalk View SE Data Agent

### Overview

**XLReporter** takes process values from tags in FactoryTalk View SE via the FactoryTalk View SE Data Agent to a report without requiring a historian or database. This is accomplished by “report-as-you-run” technology that automatically populates a workbook, periodically or on event, without needing Excel. Completed reports are produced in workbook, PDF and web formats.

### 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

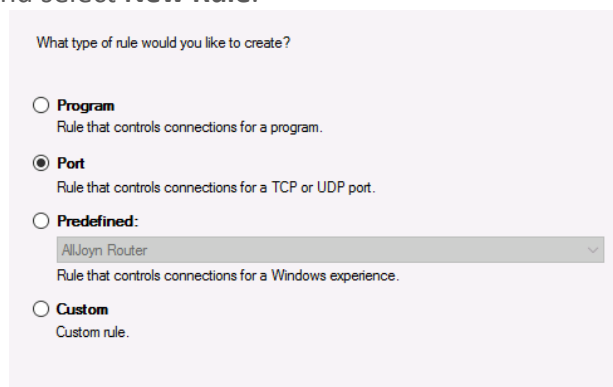
For **XLReporter** to collect data through the FactoryTalk View SE Data Agent, the application must be running.

### 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**.



- 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**

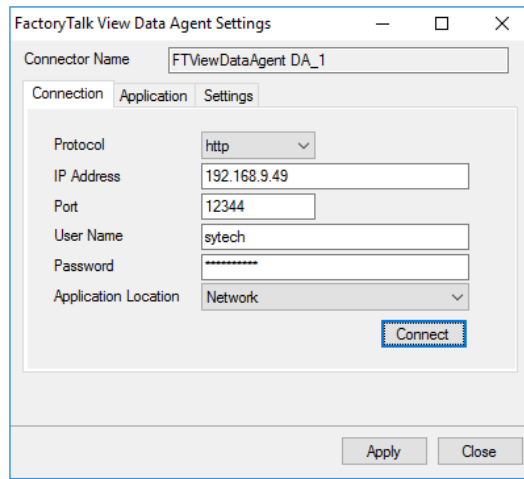
New Project

Step 2 : Configure the Connectors (data sources) of the Project.

Name	Provider	Description
*		

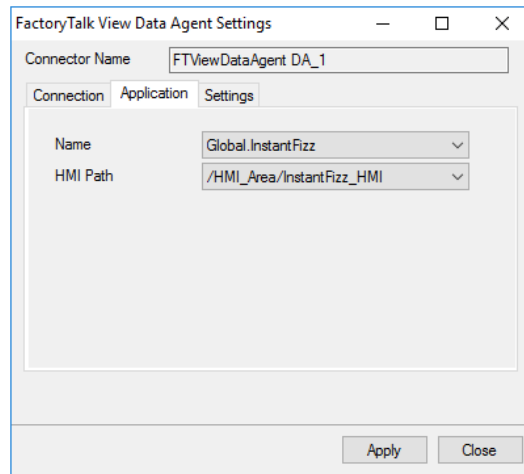
Select **Rockwell Automation, FactoryTalk View SE Data Agent Real-time values**

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

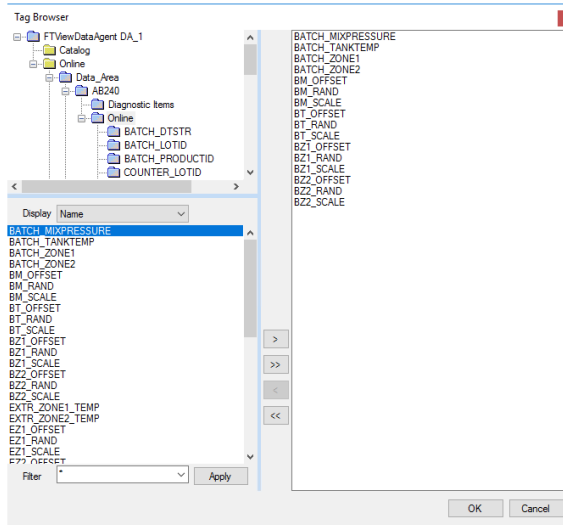


- Set the **Name** to the name of the FactoryTalk View SE application to retrieve data from.
- Set **HMI Path** to the path based on the **Application Name** selected.

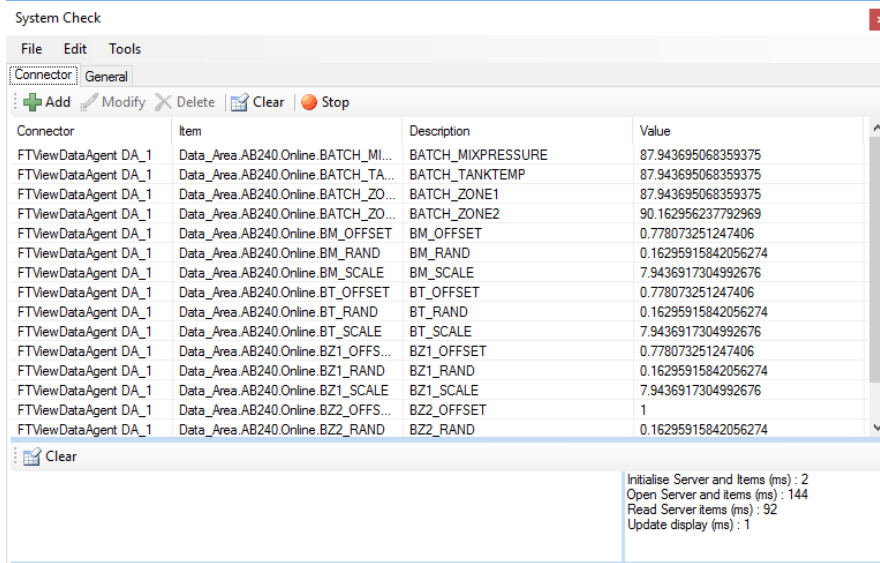
## Verify Data Communication

To verify communication to FactoryTalk View SE Data Agent, open the **Project Explorer** and select the **Tools** tab. Launch the **System Check** application.

- Click **Add**
- Choose the *FactoryTalk View SE Data Agent Connector* from the dropdown list,
- Click the pushbutton ([...]) next to Items to open the Tag Browser window.



- Select one or more tags, click **OK**.



- Click **Start** to verify the communication