

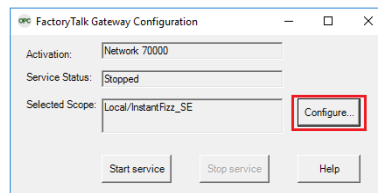
## Using XLReporter with FactoryTalk® Gateway

### Overview

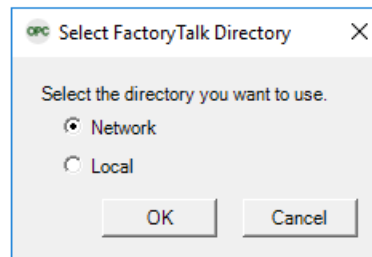
XLReporter takes process values directly from the FactoryTalk Applications to a report without requiring a historian or database. This is accomplished by “report-as-you-run” technology that automatically populates a workbook, periodically or on event, without needing Excel. Completed reports are produced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

### Setup FactoryTalk Gateway

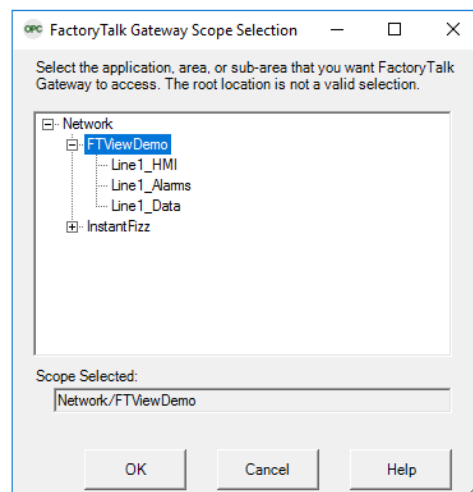
Open the **FactoryTalk Gateway Configuration** from the **Rockwell Software** program group and select **Configure**. If this option is not listed then FactoryTalk Gateway is not installed. Typically, this is installed and licensed separately from FactoryTalk View SE.



Select the directory as either **Network** or **Local** and click **OK**



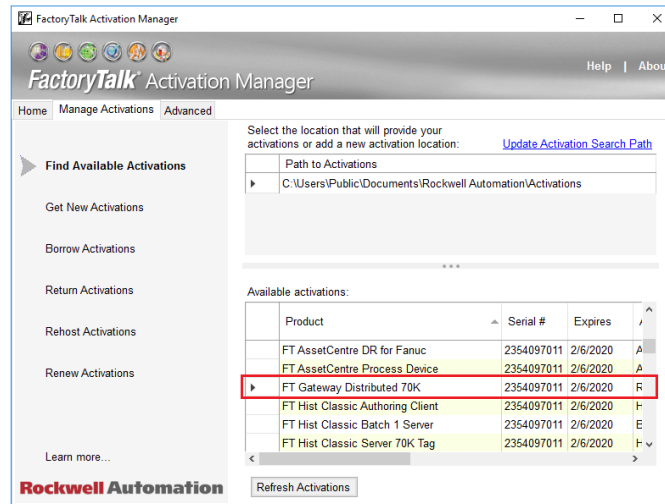
Select the application or area for FactoryTalk Gateway to access and click **OK**. Then **Start Service**.



# Prerequisites

## Verify FactoryTalk Gateway License

Open the **FactoryTalk Activation Manager** from the **Rockwell Software** program group. On the **Manage Activations** tab, verify FT Gateway is listed.



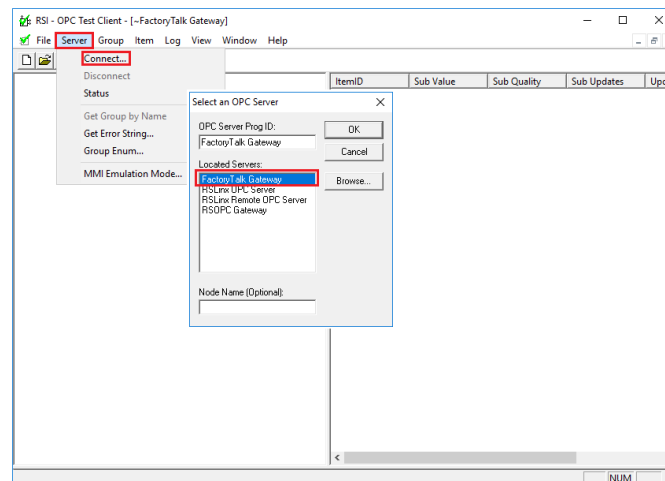
## Verify Communication

Communication between FactoryTalk Gateway and the HMI application can be verified using the OPC Test Client provided by Rockwell Software.

From the **Rockwell Software** program group select the **OPC Test Client**. This client will validate the communication and also verify that FactoryTalk Gateway is capable of exchanging data with XLReporter.

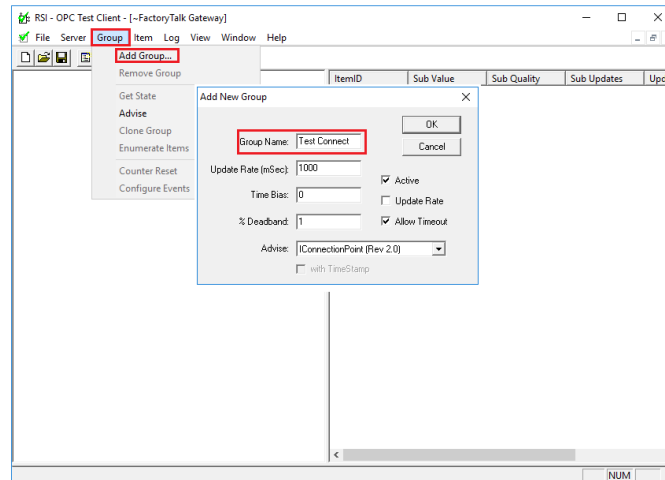
Select **Server, Connect** to open the **Select an OPC Server** window.

- Choose *FactoryTalk Gateway* and click **OK**.



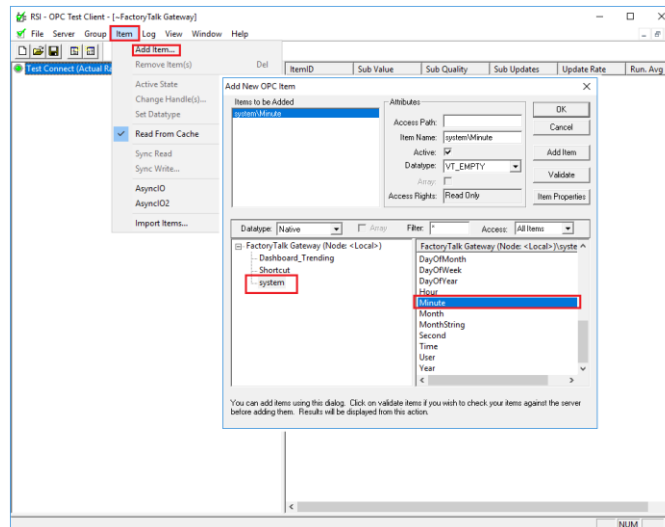
## Select **Group**, Add Group.

- Enter a **Group Name** and click **OK**.



## Select **Item**, Add Item to open the **Add New OPC Item** window.

- Select a tag by navigating in the lower left list, selecting a tag on the lower right list and clicking **Add**.
- Click **Done** to return to the **OPC Test Client** window.



All of the selected tags appear along with their real time values, type, quality, and timestamp.

If the client does not respond as described contact Rockwell Automation 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

Navigation 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, Modify, X Delete, Catalog
- Table with columns: Name, Provider, Description
- Table content: \* (in Name column)

- Select **Rockwell Automation, FactoryTalk Gateway**

The screenshot shows the 'FactoryTalk Gateway Real-time values' dialog box with the following fields and options:

- Connector Name:** FactoryTalk\_DA
- Description:** (empty)
- Primary Server:**
  - Name:** FactoryTalk Gateway
  - Node:** local
  - Test Connection button
- Secondary Server:**
  - Name:** FactoryTalk Gateway
  - Node:** local
  - Test Connection button
- Settings button
- OK, Cancel buttons

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

## Remote Communication to Gateway

If Gateway 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:

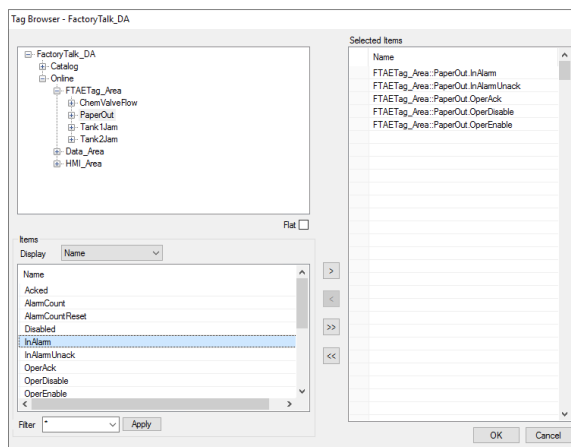
- 64 - bit OS C:\Windows\SysWow64\OPCEnum.exe
- 32 - bit OS C:\Windows\system32\OPCEnum.exe

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).

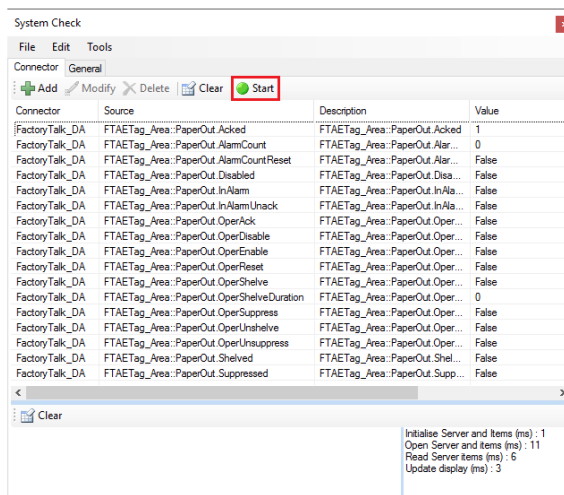
## Verify Data Communication

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

- Click **Add**.
- Choose the *FactoryTalk Gateway 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



# Scheduling

## Event Triggers

If the Scheduler is configured perform actions on events that involve multiple PLCs it is recommended that a unique Data Connector is defined for each PLC.

When a PLC goes offline, the Scheduler will require a restart. A restart of the Scheduler can be automated by configuring a *Run an Application* action with the **Application** set as `bin\xlrScheduleReset.exe`. This should be triggered periodically at a time when the events are typically not active.