

Using XLReporter with FactoryStudio History

Overview

XLReporter takes historical values directly from the Tatsoft FactoryStudio 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.

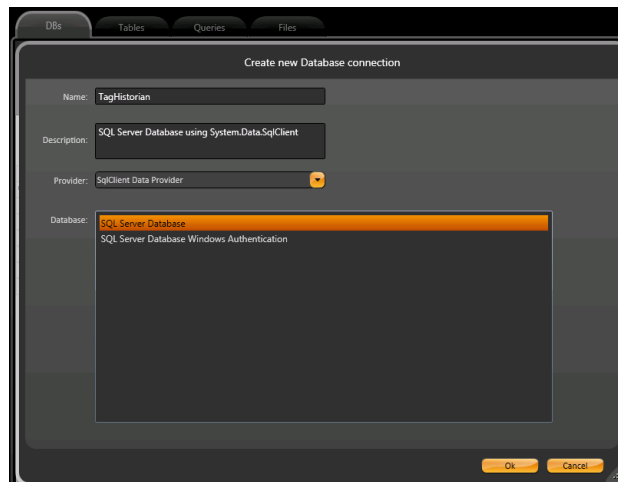
Distribute the reports by email, FTP, file server and printers. Enable **XLReporter's** Web Portal and access reports from any device supporting a web browser such as a smart phone or tablet.

Set up FactoryStudio

FactoryStudio logs historical data by defining the **TagHistorian** and a **Historian Table** to log. By default the **TagHistorian** dataset is configured to log to an internal server. In order for third party applications to access historical data, the **TagHistorian** dataset must be configured to store data to a database like Microsoft SQL Server or MySQL.

To make this change, from the FactoryStudio menu, open the project. From the menu select **Edit, Datasets**.

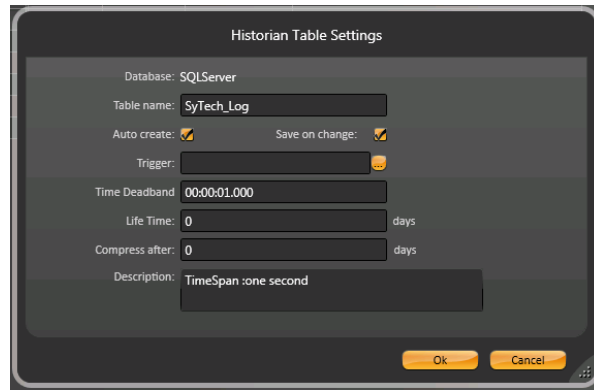
Rename the existing **TagHistorian** dataset. Then, on the **DBs** tab select **Create new....** When defining the new database connection, set the **Name** to *TagHistorian*.



Define Tags to Log

From the menu select **Edit, Tags**. Under the **Objects** tab, specify each tag you wish to log.

On the **Historian** tab, click **New** to define a **Historian Table** to log. The **Life Time** setting controls how much data is preserved. It can be set to 0 to preserve every record.



Prerequisites

Verify Database

To verify the database, open the tool provided by the database to view tables and columns. If this is a Microsoft SQL Server database, the SQL Server Management Studio is the tool to use.

Once opened, locate the table that matches the **Table name** specified in FactoryStudio and select the *TOP 1000 rows*.

If you are experiencing issues connecting or retrieving data contact Tatsoft technical support.

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).

Step 2

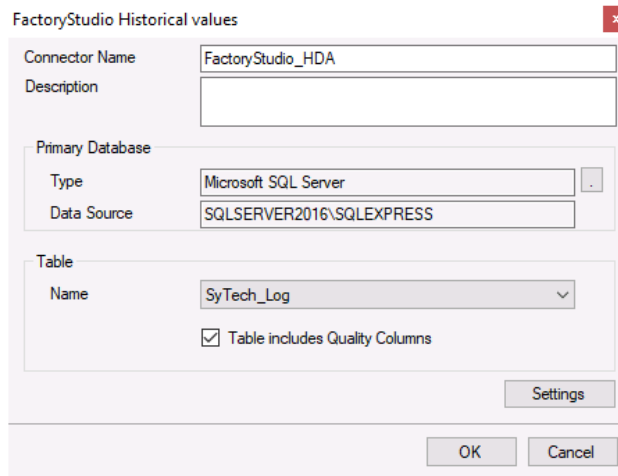
- Configure the data connector, click **Add**

Name	Provider	Description
*		

Select **Tatsoft, FactoryStudio Historical values**.

- Under **Primary Database** click the browse pushbutton ([...]) for **Name**.
- Select the database type on the left and fill out the information to connect to the database where FactoryStudio is logging historical data.
- Click **Test connection** to verify connectivity.

Back in the **Connector**,



- Select the Table corresponding to the table specified when configuring historical logging the FactoryStudio.
- If the quality is logged along with the historical values in the database check the **Table includes Quality Columns** option so that quality can be factored in on any calculations performed.

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 *FactoryStudio Historical values* 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**.