

## Using XLReporter with FactoryStudio Real Time

### Overview

**XLReporter** takes process values directly from FactoryStudio 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.

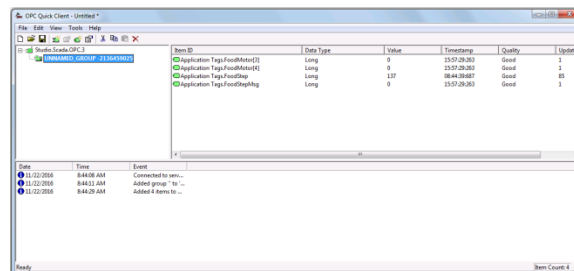
### Prerequisites

#### Verify Communications

To verify communication from Tatsoft’s FactoryStudio, a generic OPC test client is provided to test the OPC Server.

This client is available from the Tools folder of the **XLReporter** install CD and can be downloaded from [www.SyTech.com](http://www.SyTech.com).

To open, double-click **SampleClientDA.exe**. This opens the **OPC Quick Client** window.



To connect to an OPC server, select **Edit, New Server Connection** to open the **Server Properties** window. Select the Tatsoft OPC server and click **OK**.

Once the connection is made, select **Edit, New Group**. Specify **Name** and click **OK**.

Click on the group name created, and select **Edit, New Item**. This opens the **Add Items** window. Browse for tags and double click any to select. Once tag selection is complete click **OK** to return to the **OPC Quick Client** window.

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

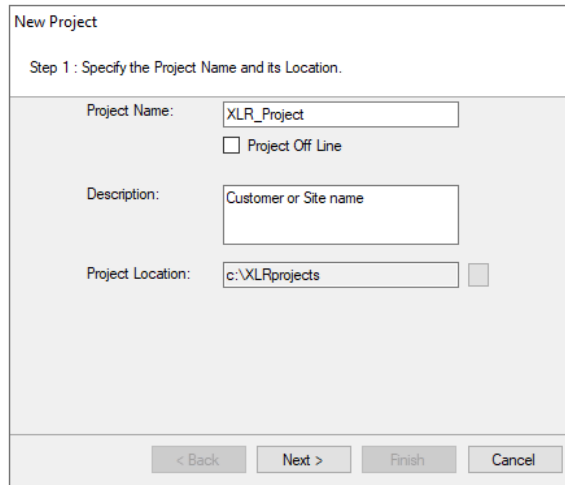
If at any point you experience an issue with this client, contact Tatsoft technical support to troubleshoot and correct these issues.

# 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).



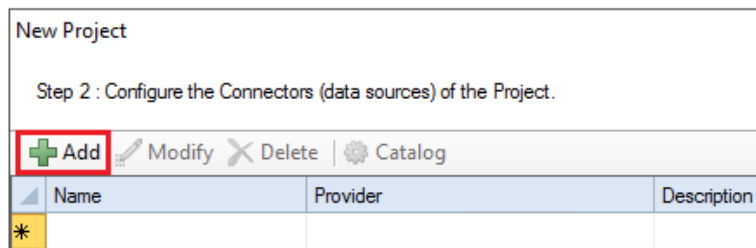
The screenshot shows the 'New Project' dialog box with the following fields and options:

- Project Name:** XLR\_Project
- Project Off Line
- Description:** Customer or Site name
- Project Location:** c:\XLRprojects

At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and '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** (highlighted with a red box), Modify, Delete, and Catalog.
- Table with columns: Name, Provider, and Description.
- Table content: A single row with an asterisk (\*) in the Name column.

Select **Tatsoft, FactoryStudio Real-time values**.

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

## Remote Communication to FactoryStudio

If FactoryStudio 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 FactoryStudio, open the **Project Explorer** and select the **Tools** tab. Launch the **System Check** application.

- Click **Add**
- Choose the *FactoryStudio Real-time* 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.