

## Using XLReporter with Wonderware InTouch

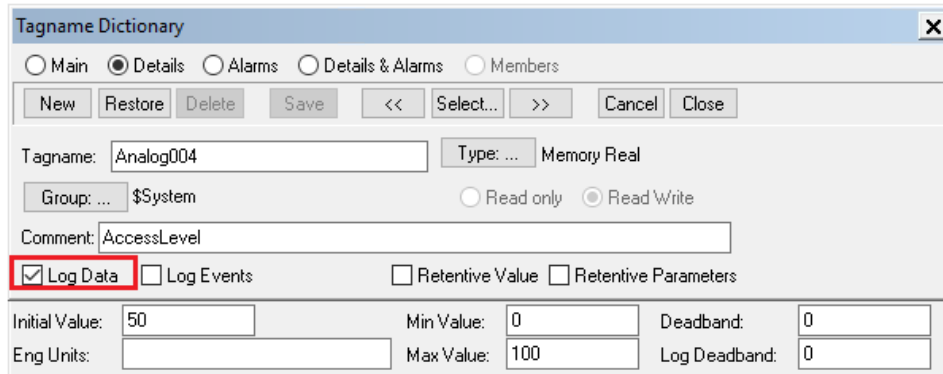
### Overview

**XLReporter** takes historical values from the InTouch historical logs 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, tablet, desktop or an InTouch HMI display.

### InTouch Configuration

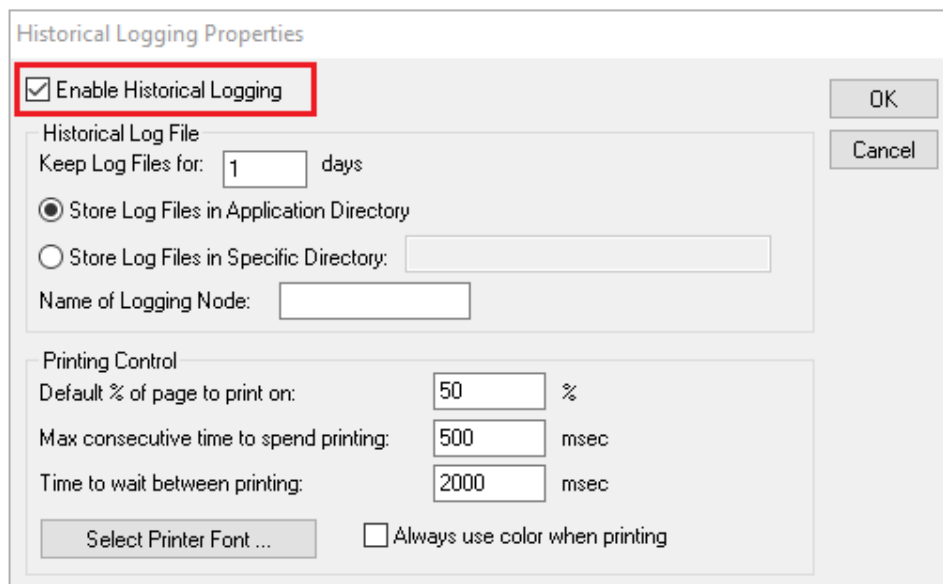
To set up data logging, from the **Wonderware InTouch** program group, open **InTouch Window Maker**. From the top ribbon menu in **WindowViewer** select **Special, Tagname Dictionary**.



The screenshot shows the 'Tagname Dictionary' dialog box. The 'Details' tab is selected. The 'Log Data' checkbox is checked and highlighted with a red box. Other fields include Tagname: Analog004, Type: Memory Real, Group: \$System, Comment: AccessLevel, and various value and deadband settings.

For each tag that requires historical logging, check the **Log Data** option.

In the InTouch **Window Maker** menu, select **Special, Configure, Historical Logging** to open the **Historical Logging Properties** window.



The screenshot shows the 'Historical Logging Properties' dialog box. The 'Enable Historical Logging' checkbox is checked and highlighted with a red box. Other settings include Keep Log Files for: 1 days, Store Log Files in Application Directory, and Printing Control options.

Check **Enable Historical Logging**. Historical log files have the file extension **\*.lgh**.

## InTouch WindowViewer

In order for historical data to log, **WindowViewer** must be in a running state. If it is not already running, from the **Wonderware InTouch** program group, open **WindowViewer**.

## 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 (highlighted with a red box), Modify, Delete, Catalog
- Table with columns: Name, Provider, Description
- Table content: \* (in the Name column)

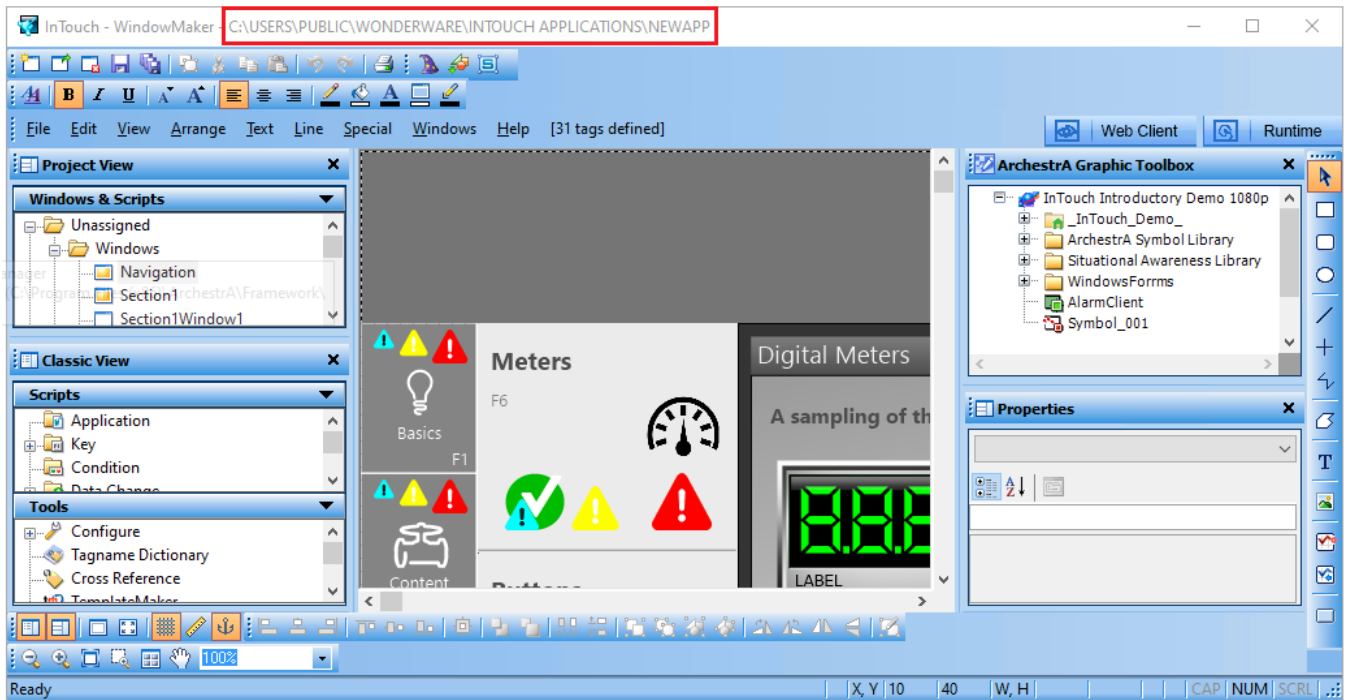
## Select **Wonderware, InTouch Historical Values (classic)**

The screenshot shows the 'InTouch Historical values (classic)' dialog box with the following fields and options:

- Connector Name:** InTouch\_HistoryClassic
- Description:** local InTouch HMI historical data
- InTouch Paths:**
  - Installation:** C:\Program Files (x86)\Wonderware\InTouch
  - Application:** C:\Users\Public\Wonderware\Intouch Applications\Nei
  - History Data:** C:\Users\Public\Wonderware\Intouch Applications\Nei
- Buttons: Settings, OK, Cancel

- The connector requires an **Installation** path, which is preconfigured to the default location.

- The **Application** path points to the location of the HMI application.



This can be found at the top of the **WindowMaker** or **WindowViewer**.

- Enter the **History Data** path configured in **Historical Logging Properties**.

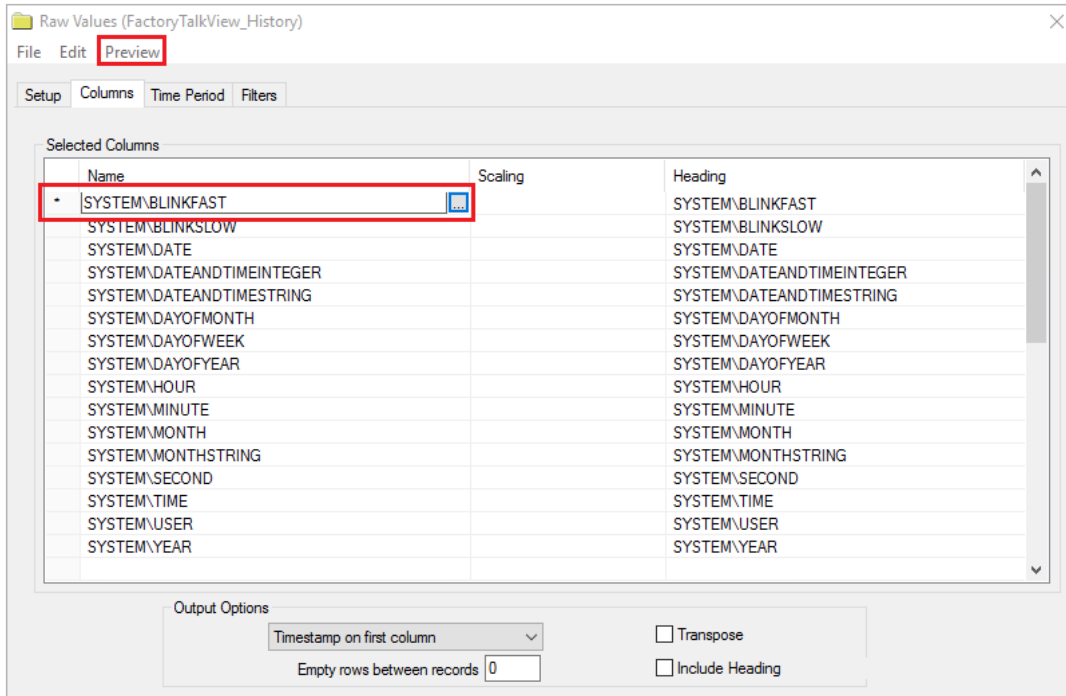
# Verifying the Historical Data Connector

**Connector Groups** are designed in **Project Explorer, Tools, Connector Groups** and can verify the data can be retrieved by **XLReporter**.

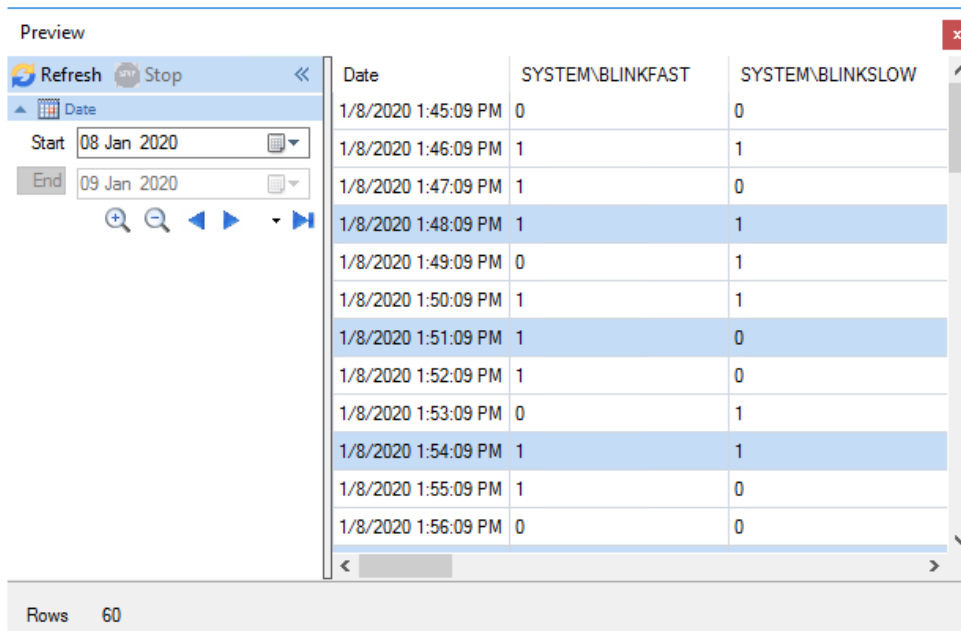
Select the *InTouch historical connector* and then select **Add**.

- Set the **Type Raw Values** and click **OK**.

On the **Columns** tab of the group, select the tag **Name(s)**.



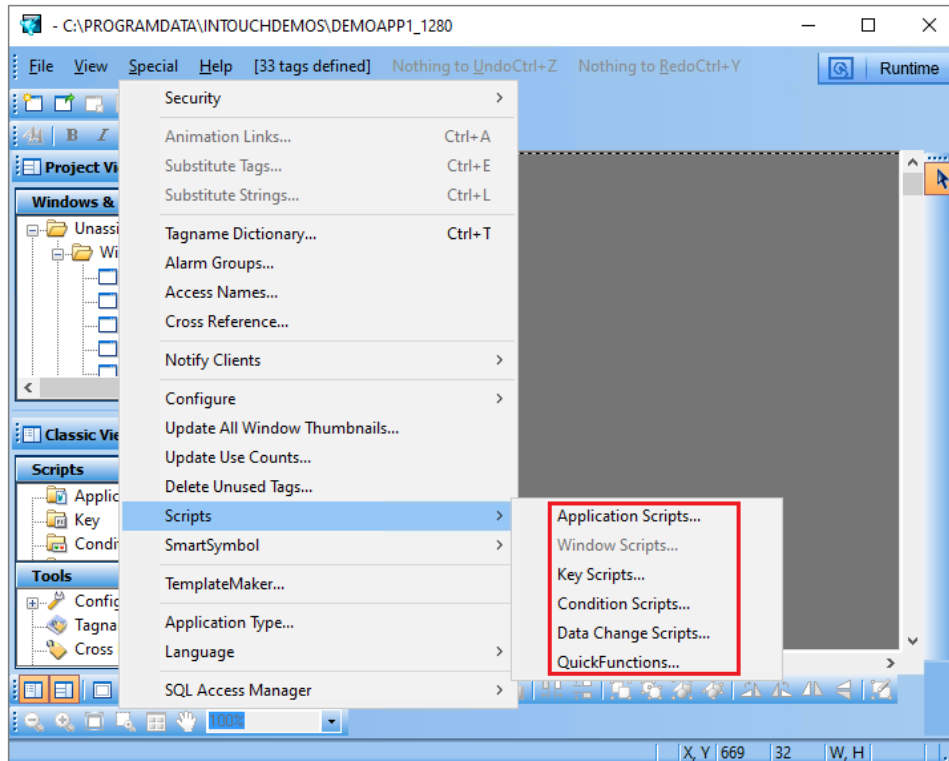
Select **Preview**, pick a *Start* date and click **Refresh**.



# Scheduler Startup

## Start the Scheduler from InTouch

The **XLReporter Scheduler** is used to process reports automatically in the background. It is recommended to start the scheduler from an InTouch Script so it starts when the HMI is started. To configure an InTouch script, from the **Wonderware InTouch** program group, open **InTouch WindowMaker**. Scripts configured in **WindowMaker** run when the HMI application is started in **WindowViewer**.



- From **WindowViewer** open **Special, Scripts**  
The most straightforward approach is to use an **Application** script with an **On Startup** condition.
- The script syntax to start the **Scheduler** is:

*StartApp "C:\XLReporter\xlrschedule.exe";*