

## Using XLReporter with Wonderware InTouch

### Overview

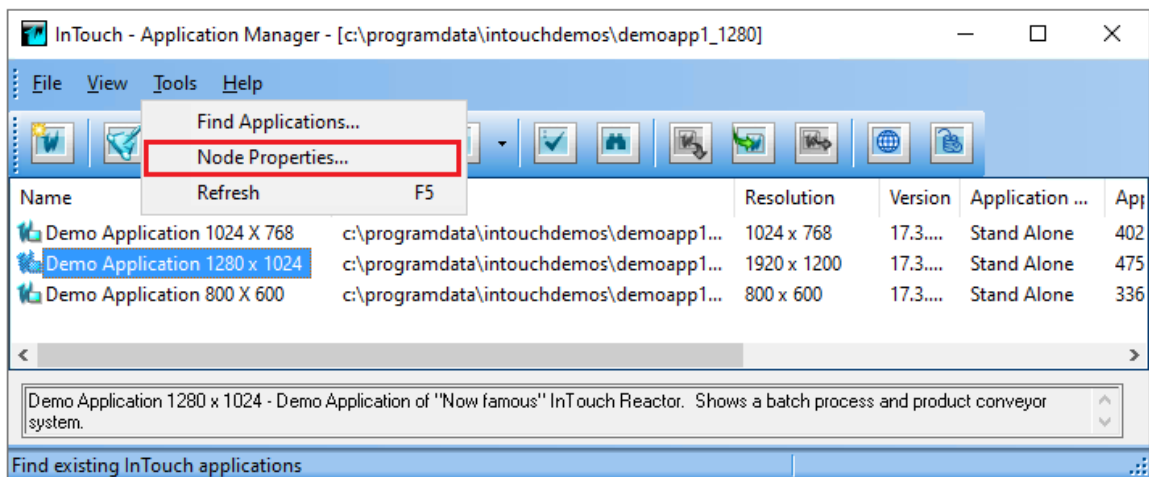
**XLReporter** takes process values directly from tags in the InTouch Tagname Dictionary to a report without requiring a historian or database. This is accomplished by “report-as-you-run” technology that automatically populates a workbook, periodically or on event, without needing Excel. Completed reports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

### InTouch Configuration

#### WWHEAP Memory

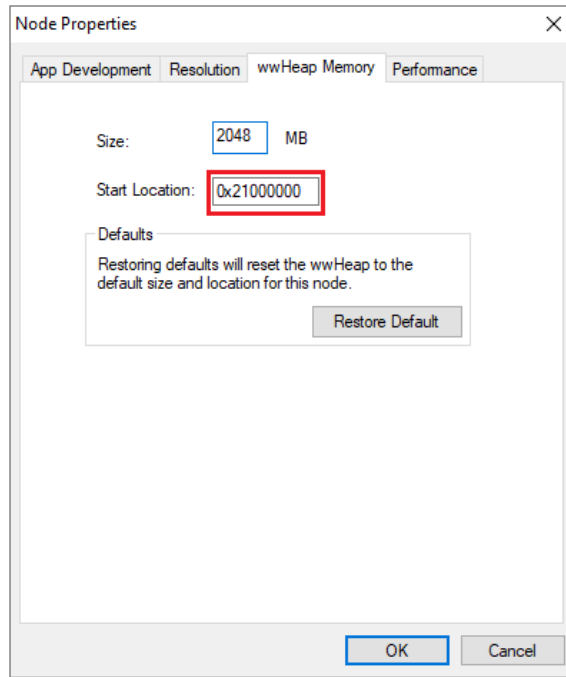
By default, the internal memory settings in InTouch do not support connectivity by client applications. To change these settings:

- From the **Wonderware InTouch** program group, open the **InTouch Application Manager**.



- Select **Tools, Node Properties**.

Under the **wwHeap Memory** tab,

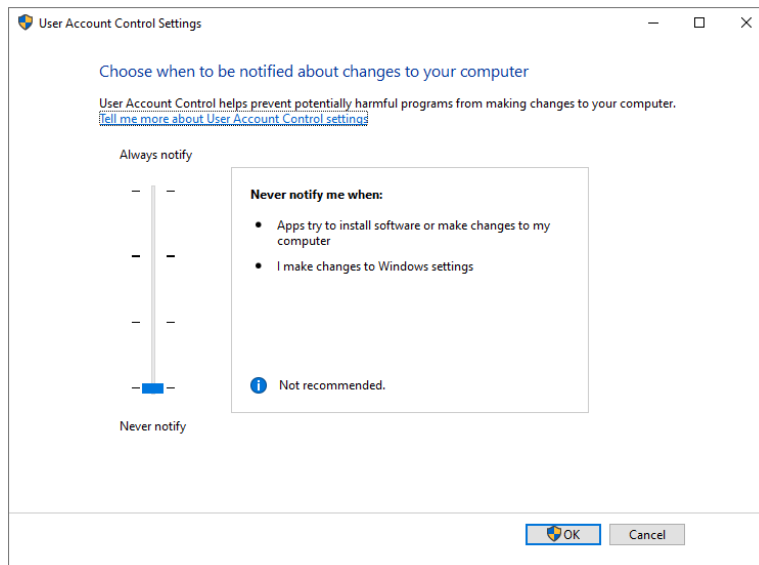


- Set **Start Location** to *0x21000000*.
- Reboot the machine for the setting change to take effect.  
*\*This setting configuration is not an official Wonderware recommendation. If **XLReporter** cannot be connected even with this configuration, contact Wonderware technical support.*

## Windows User Account Control

It is recommended by Wonderware to run InTouch with Windows UAC set to **Never Notify**.

To configure UAC, in **Windows Search** enter *UAC*.

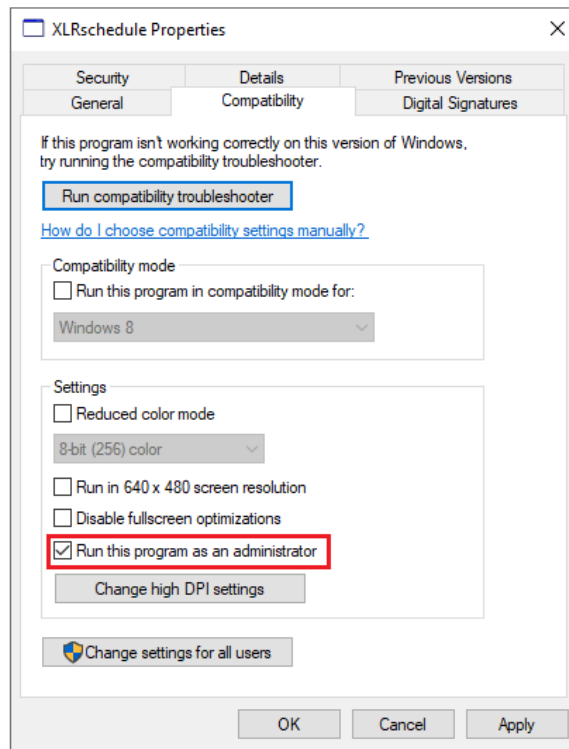


- In **User Account Control Settings** move the slide control to the lowest option for **Never Notify**.

## Administrative Privileges

Applications that connect to InTouch, such as **XLReporter's Scheduler** and **Project Explorer**, must be run with explicit administrative privileges.

- Use **Windows File Explorer** to navigate to *C:\XLReporter*.
- Select *XLRSchedule.exe*, right-click and select **Properties**.



- Under the **Compatibility** tab, check *Run this program as an administrator*.
- Repeat this procedure for the **Project Explorer** (*C:\XLReporter\bin\XLRiProject.exe*).

## InTouch WindowViewer

For **XLReporter** to collect data, **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

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:

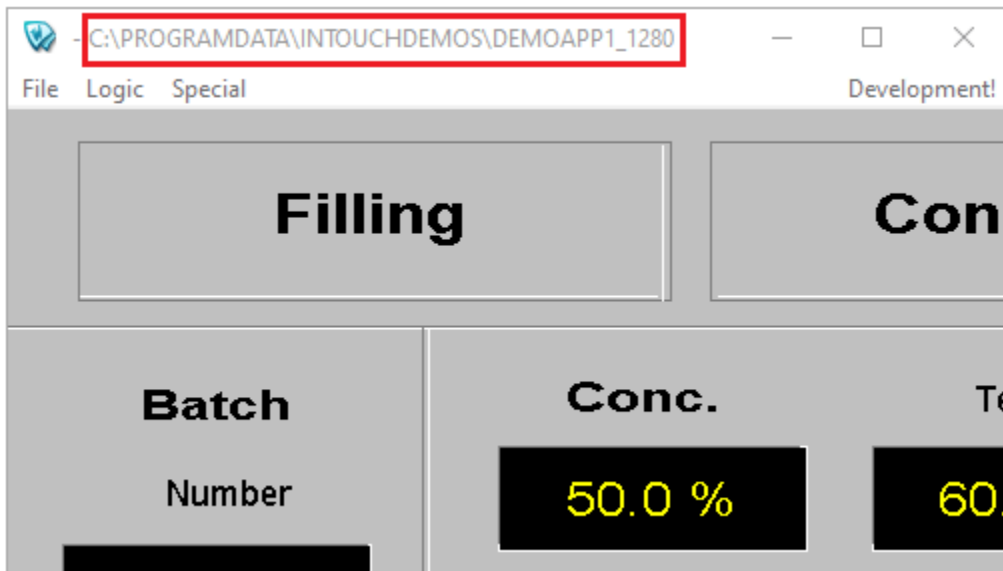
- Step 2 : Configure the Connectors (data sources) of the Project.**
- Buttons: + Add (highlighted in red), Modify, X Delete, Catalog
- Table with columns: Name, Provider, Description
- Table content: \*

Select **Wonderware, InTouch Real-time values (local)**

The screenshot shows the 'InTouch Real-time values (local)' dialog box with the following fields and options:

- Connector Name:** InTouch\_DA
- Description:** local InTouch HMI
- InTouch Paths:**
  - Installation:** C:\Program Files (x86)\Wonderware\InTouch
  - Application:** C:\Users\Public\Wonderware\Intouch Applications\New
- 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 InTouch application.

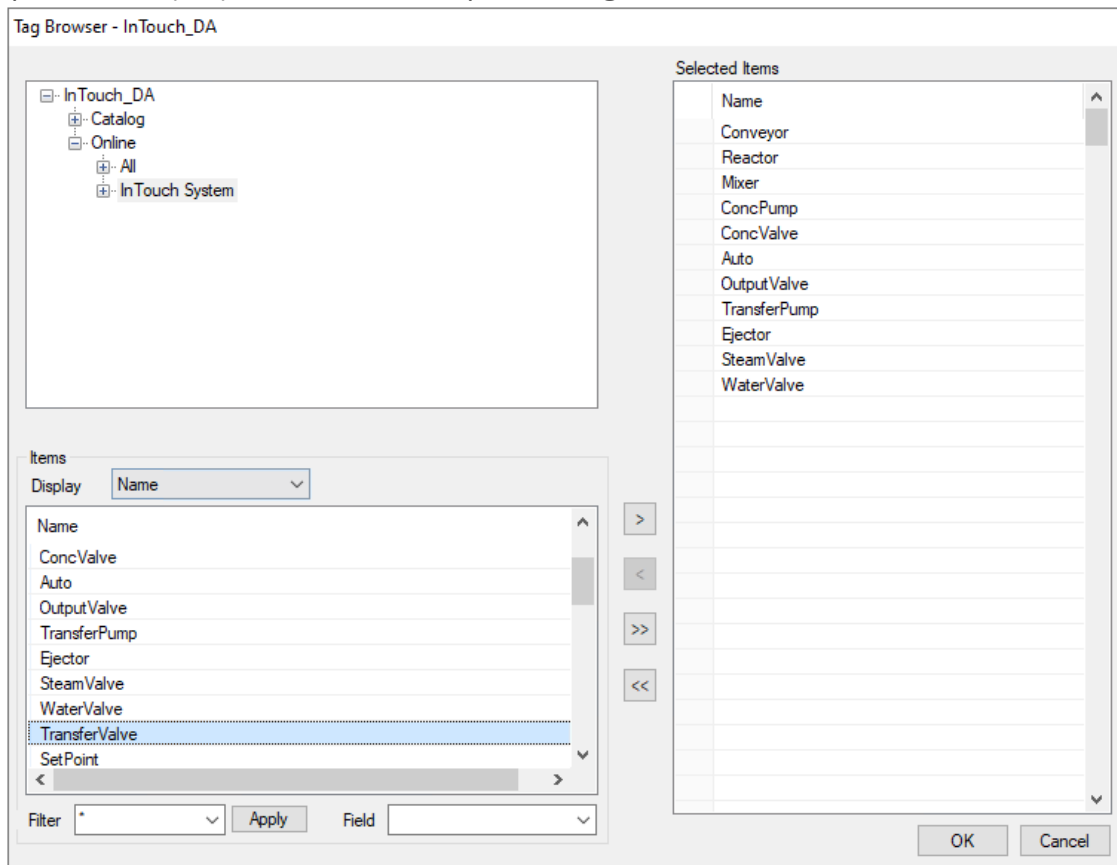


This can be found at the top of the **WindowViewer** window.

## Verify Data Communication

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

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



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

System Check ×

File Edit Tools

Connector General

+ Add    ✎ Modify    ✕ Delete    🗑 Clear    **● Start**

Connector	Source	Description	Value
InTouch_DA	Analog001	Analog001	50
InTouch_DA	Analog002	Analog002	50
InTouch_DA	Analog003	Analog003	50
InTouch_DA	Analog004	Analog004	50
InTouch_DA	Analog005	Analog005	50
InTouch_DA	Analog006	Analog006	50
InTouch_DA	Analog007	Analog007	50
InTouch_DA	Analog008	Analog008	50
InTouch_DA	Analog009	Analog009	50

< \_\_\_\_\_ >

🗑 Clear

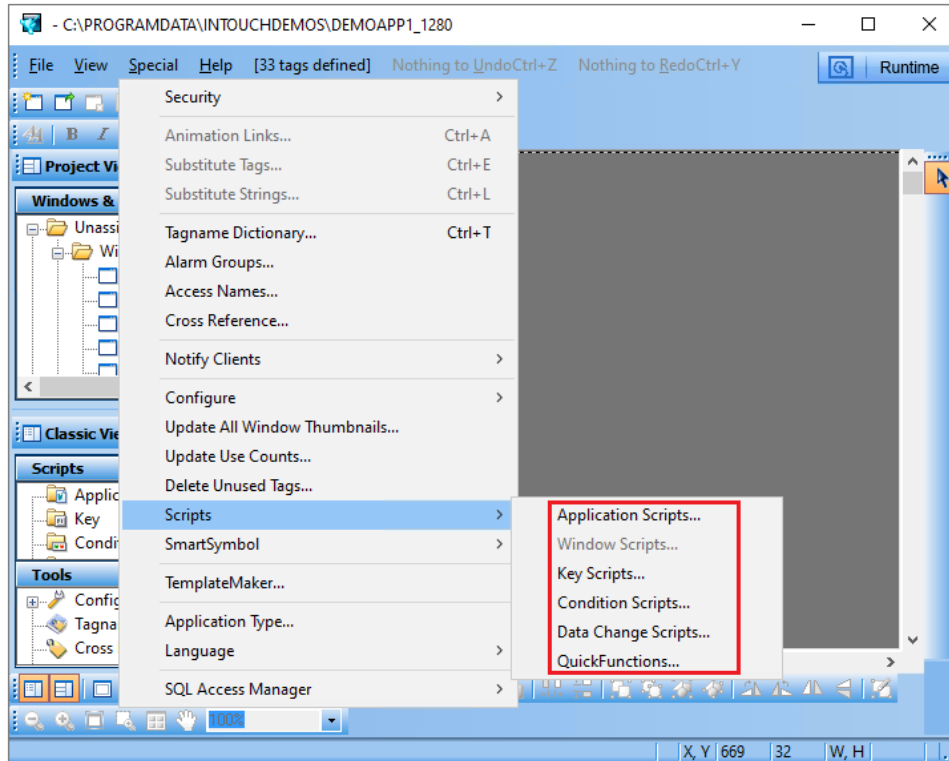
Initialise Server and Items (ms) : 1  
Open Server and items (ms) : 1906  
Read Server items (ms) : 0  
Update display (ms) : 1

- Click **Start** to verify the communication.

# 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** select **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";
```