

## Using XLReporter with Wonderware InTouch

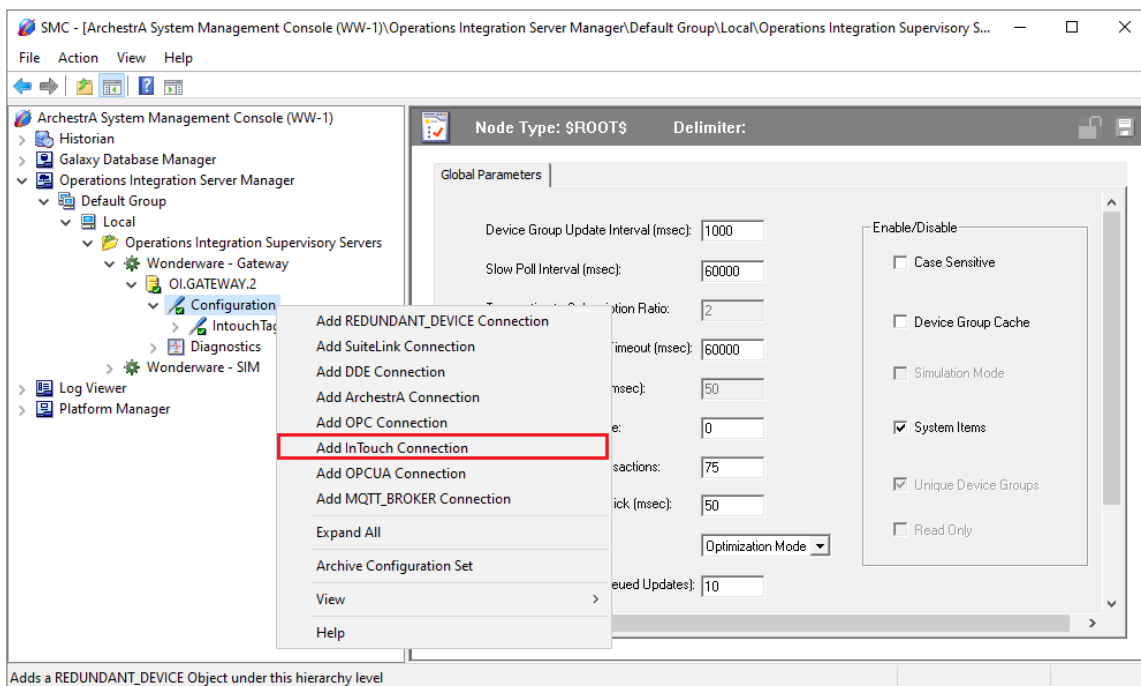
### Overview

**XLReporter** takes process values from tags in the Wonderware Operations Integration Gateway OPC server 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

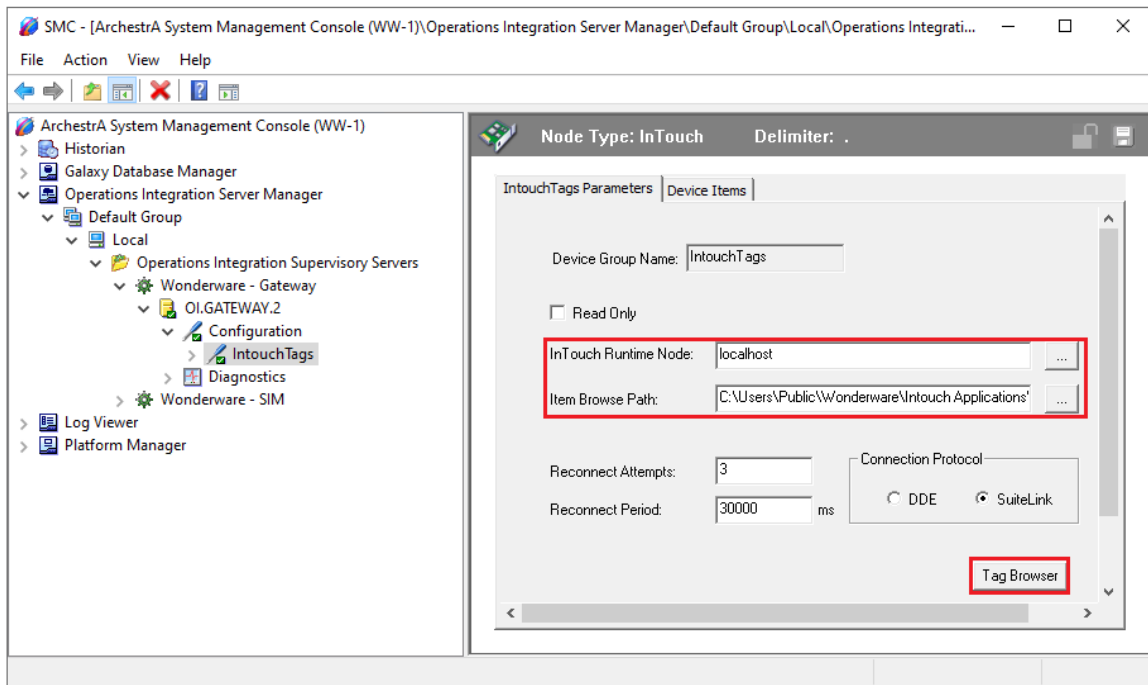
#### Operations Integration Supervisory OPC Server

The OPC DA server in InTouch is defined in the **System Platform Management Console**. To open, from the **Wonderware Utilities** program group, select **System Platform Management Console**.



- Expand **Operations Integration Server Manager, Default Group, Local, Operations Integration Supervisory Servers, Wonderware – Gateway**.
- By default the *OI.GATEWAY.2* server is listed and can be used. Otherwise, right-click on *Wonderware – Gateway* to create a new server instance.
- Expand either *OI.GATEWAY.2* or the server created, right-click **Configuration**, and select **Add InTouch Connection**.

\*The OI servers in Wonderware support OPC connectivity to a variety of data sources beyond the InTouch Tagname Dictionary. The OI interface allows any of these sources to be exposed as an OPC DA server



- Set the **Item Browse Path** to that of the active InTouch application. This path is displayed at the top of **WindowViewer**.
- Open the **Tag Browser** and add any InTouch tags to be exposed to the OPC server.

## InTouch WindowViewer

For **XLReporter** to collect data from InTouch tags through the OI gateway, **WindowViewer** must be in a running state. If it is not already running, from the **Wonderware InTouch** program group, open **InTouch 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).

**New Project**

Step 1 : Specify the Project Name and its Location.

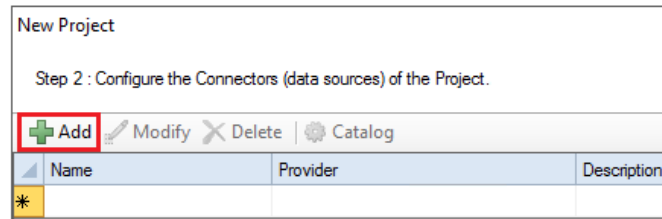
Project Name:   Project Off Line

Description:

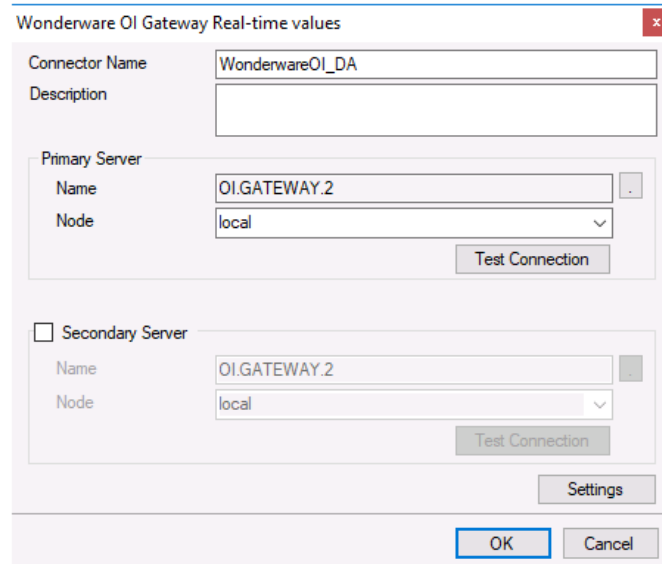
Project Location:

## Step 2

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



## Select **Wonderware, Wonderware OI Gateway Real-time values**



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

## Remote Communication to the OI Gateway

If InTouch is installed on a workstation remote from the HMI application 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:

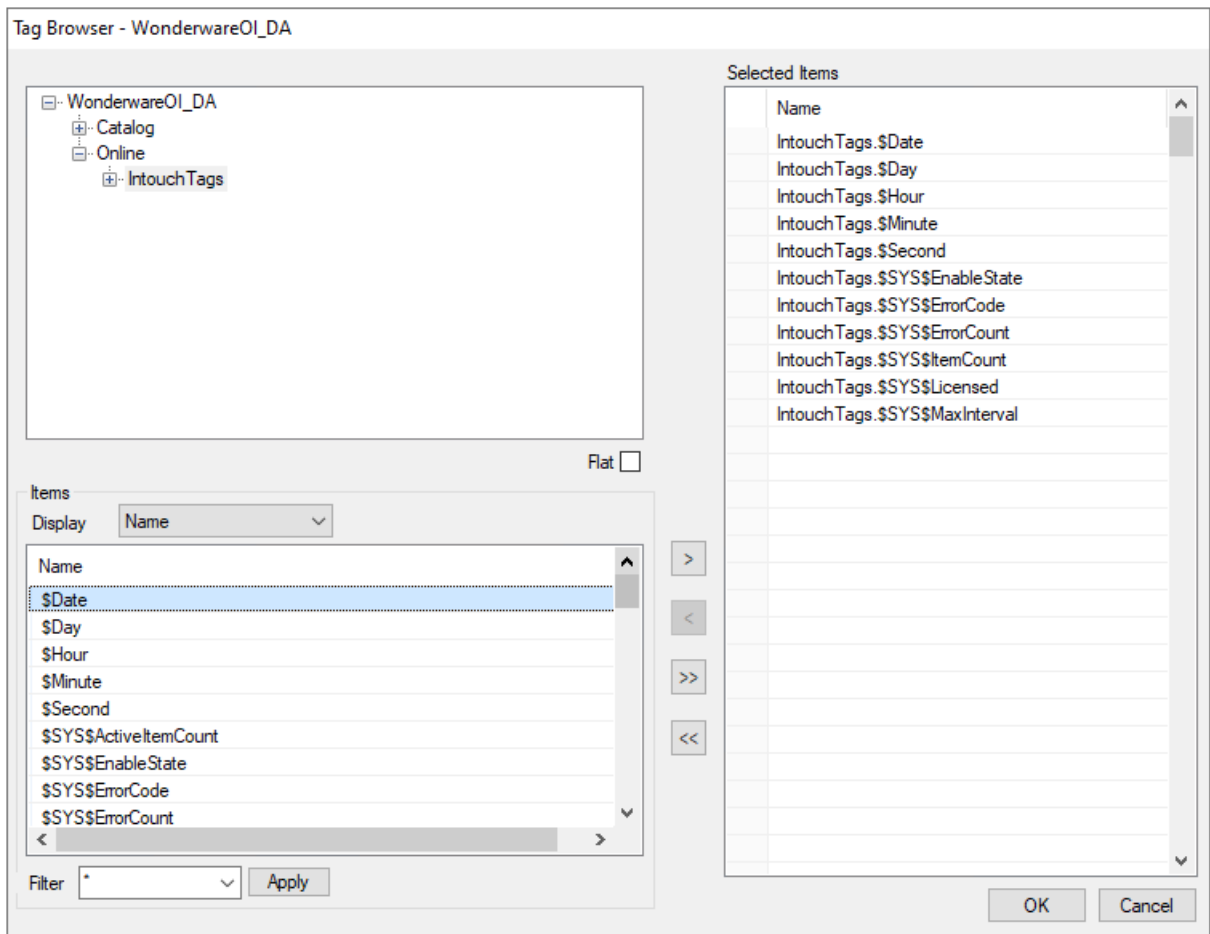
- 64 - bit OS C:\Windows\SysWow64\OPCEnum.exe
- 32 - bit OS C:\Windows\system32\OPCEnum.exe

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).

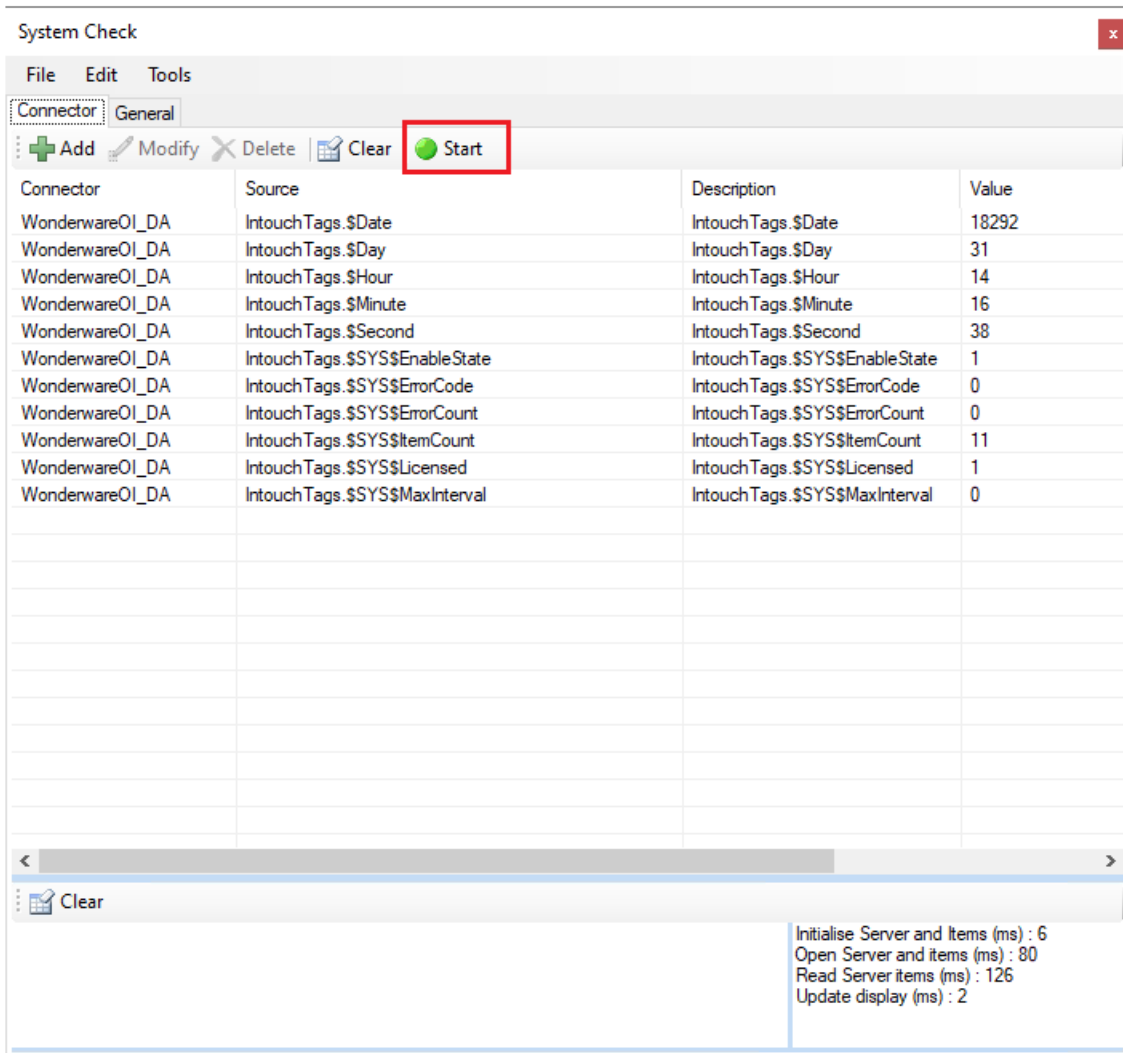
## Verify Data Communication

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

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



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

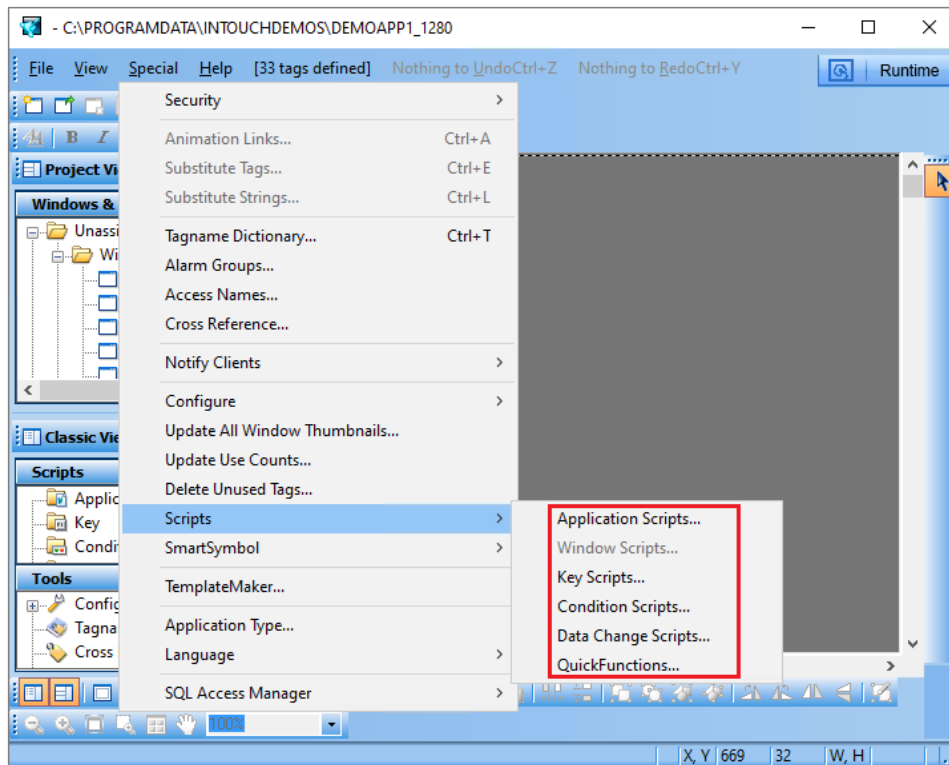


- Click **Start** to verify the communication

## 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, open **InTouch WindowMaker** from the **Wonderware InTouch** program group in the Start menu. 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";*