

Develop a Reporting Solution Off Line

Overview

The plant floor may be the place where all the data sources are available, but oftentimes is not the easiest place to develop the reporting solution. Wouldn't it be better to develop in a more comfortable location like your office or home or, if you are traveling, to take advantage of your downtime to work on the solution.

XLReporter provides the tools in place to do all your development off line from anywhere. The following document demonstrates how the project can be taken from site, developed wherever, whenever and then brought back to site, ready to go.

On Site

If you have just installed **XLReporter**, you should start by creating a new project for your solution.

Create a Project

In the **Project Explorer**, create a new project by selecting **File, New Project**.

Give it a **Project Name** and **Location** then click **Next** to define the **Data Connectors** for the project.

Data Connectors

The second step in creating a project is defining the **Data Connectors** for it. Each connector defines a specific interface that **XLReporter** connects to in order to retrieve data for reports.

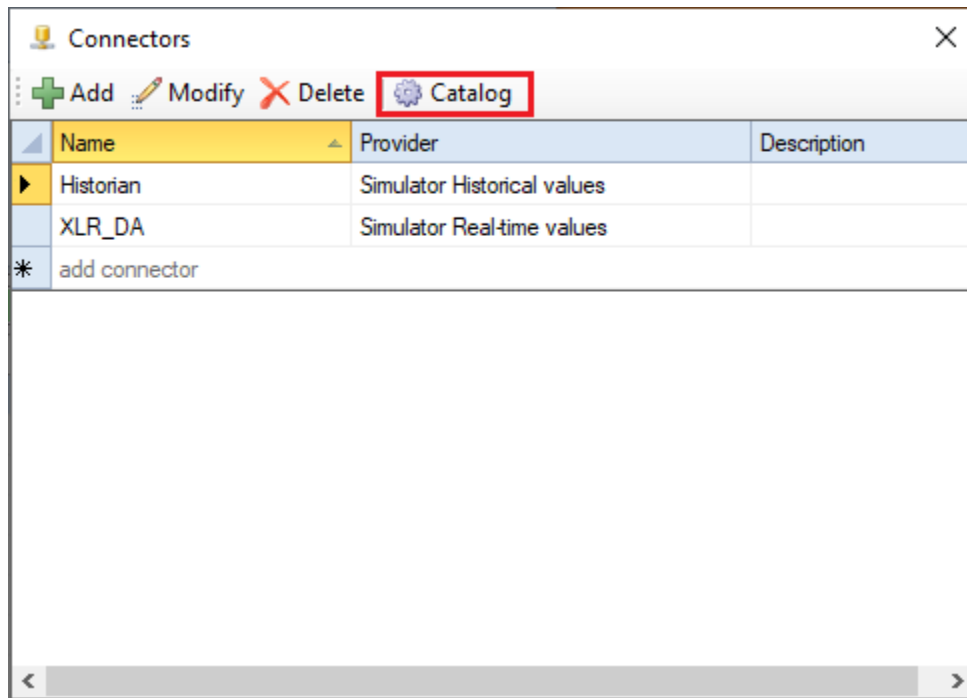
If you have already created a project and need to add more **Data Connectors**, from the **Project Explorer**, under the **Data** tab, select **Connectors**.

Click **Add** to add a new connector to the project.

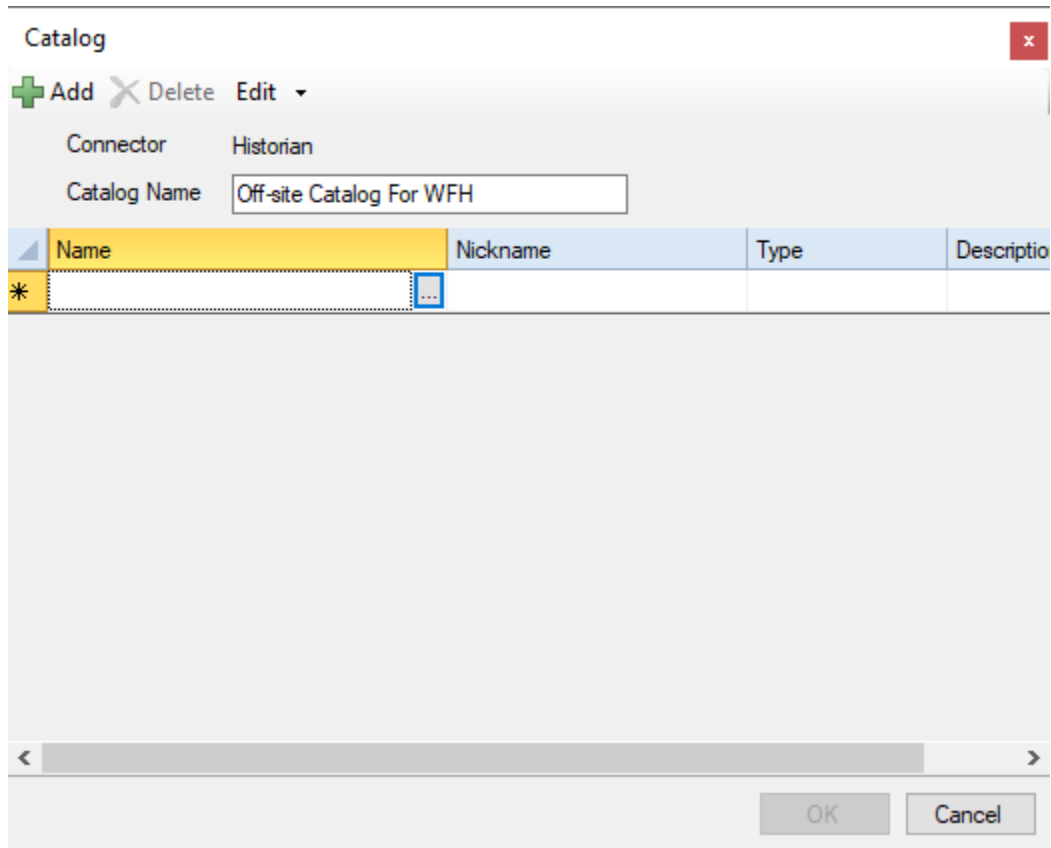
Item Catalogs

For each connector, one or more **Item Catalogs** can be defined. An **Item Catalog** can serve many purposes like categorizing tags by areas in the plant, restricting tags for the user to choose from in On-Demand report and to provide lists of tags to use when developing off-line.

Item Catalogs are defined in for each connector in **Data Connectors**.



To define, select the row for the connector and click **Catalog**.



Set a **Catalog Name**.

To define the tags for the **Catalog**,

- Select the first row under the **Name** column.
- Click the browse pushbutton [...] to open the **Tag Browser**.
- Select all the tags you want to include in the **Catalog**.
- Click **OK**.

Each tag selected also has a **Nickname**, **Type** and **Description**.

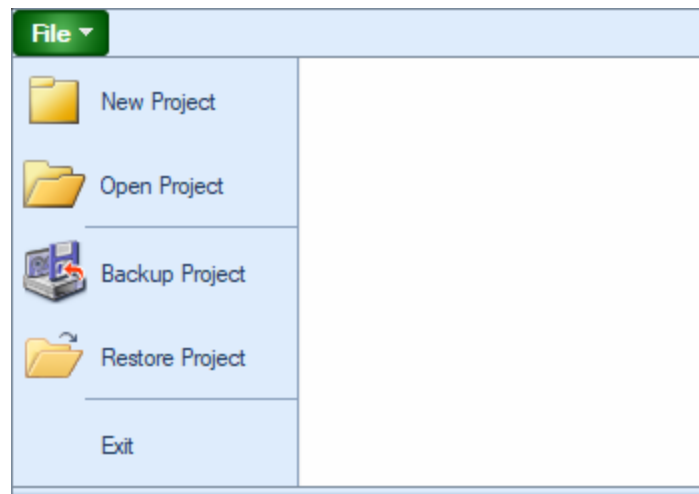
The **Nickname** can be used to give a more easily understandable name to select in the tag browser. The **Nickname** for each row can be changed manually or can be changed on mass by selecting **Edit, Nickname**.

Click **OK** to save the **Catalog**.

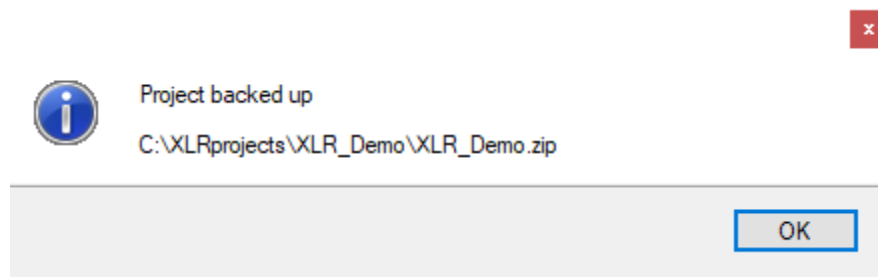
Multiple **Catalogs** can be defined for a connector. When browsing for tags, every connector defined is made available to select from.

Backup the Project

To take the project offline, it needs to be backed up to a compressed file. This is done in **Project Explorer** by selecting **File, Backup Project**.



The project can be backed up to a compressed folder for easy transport.



A message appears indicating where the project is backed up. Copy this file to a thumb drive to take with you off site.

Off Site

Once off site, install **XLReporter** on your development PC or laptop. After installation is complete, register for evaluation.

To do so, in the **Project Explorer**, under the **Home** tab, click **Register Product**.

Fill out the form and click **Start Trial**. This gives you a 2 hour evaluation period, which can be extended 2 hours at a time by clicking the **Extend Trial** button.

Load the Project

Copy the compressed project file from your thumb drive and put it on the machine.

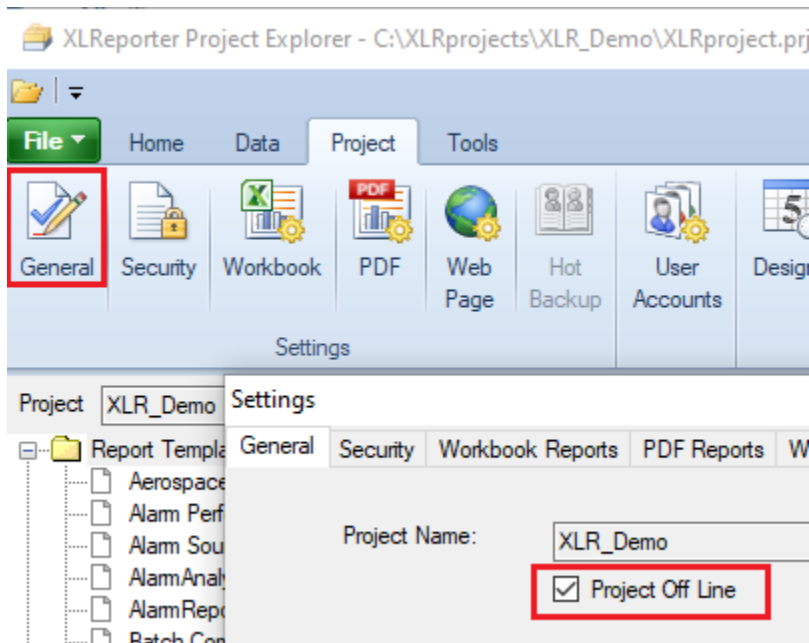
To load this project, in the **Project Explorer**, select **File, Restore Project**.

Browse and select the compressed project file.

The project should now be loaded.

Enabling Off Line Mode

When developing off line, the data sources are not available however it would be nice to be able to test reports with simulated data. This can be done by taking the project off line. In the **Project Explorer**, under the **Project** tab select **Settings, General**.



Check the **Project off line** setting and click **OK**.

Solution Development

At this point you are free to develop the entire solution and test it out.

When browsing for tags, the **Item Catalogs** created on site are all available to select from.

When testing report templates and schedules, simulated data is brought into the report.

Once development is complete, perform the following:

- Put the project back on line by going back to the **Project Explorer** and under the **Project** tab select **General**. Uncheck **Project Off Line** and click **OK**.
- Back up the project from the **Project Explorer** by selecting **File, Backup Project**.
- Copy this backup file to your thumb drive to bring back on site.

Back On Site

Redeploying the Project

Once back on site, the project can be redeployed. Copy the project backup file from your thumb drive and put it on the running machine.

Before we restore the project, we should back up the original project on the machine. Open the **Project Explorer** and identify the project location in the title bar. Using Windows File Explorer, navigate to the folder containing your project and rename the project folder.

Now, in the **Project Explorer** select **File, Restore Project**. Navigate to the project backup folder and select.

The project you developed off line should now be loaded.

Before starting everything up, it is a good idea to check the system to ensure everything is good to go. From the **Project Explorer**, under the **Tools** tab select **System Check**.

Under the **General** tab click **Start**. This ensures all the report directories are synchronized and the data connectors are available.

At this point, go forth and report!