

Publish Reports to Cloud Storage Services

Overview

Cloud Storage services offered by Microsoft, Google, and many others offer secure storage so files can be accessed anywhere and from any device.

This outlines how to publish **XLReporter** reports using cloud services like these.

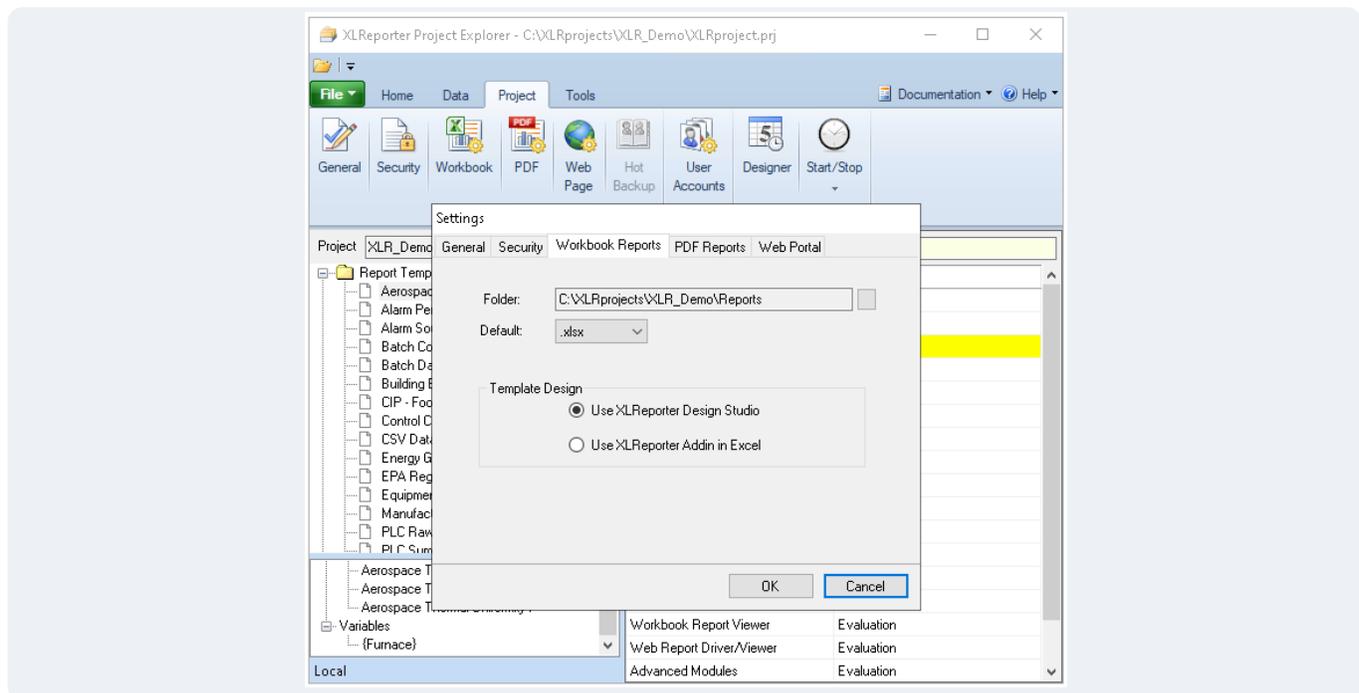
Report Configuration

Most cloud services work by running a service on the local machine where **XLReporter** is installed. The services synchronize the contents of a local directory with one in the cloud, so there is no interference between the cloud platform and **XLReporter** when the two applications are operating on the same directories. In light of that, there are a few approaches that can be used for cloud publishing:

- The cloud syncing application can be directed at the report directories of the **XLReporter** project for workbooks, web, or PDF. This would synchronize every report in the project to the cloud.
- The application can be directed to the report subfolder for a particular report template to sync all the reports of a specific template to the cloud.
- A **Schedule Action** can be used to copy reports into a specific directory the cloud application is monitoring.

Report Folders

The report folders of the active **XLReporter** project are configured from the **Project** tab of **Project Explorer**.

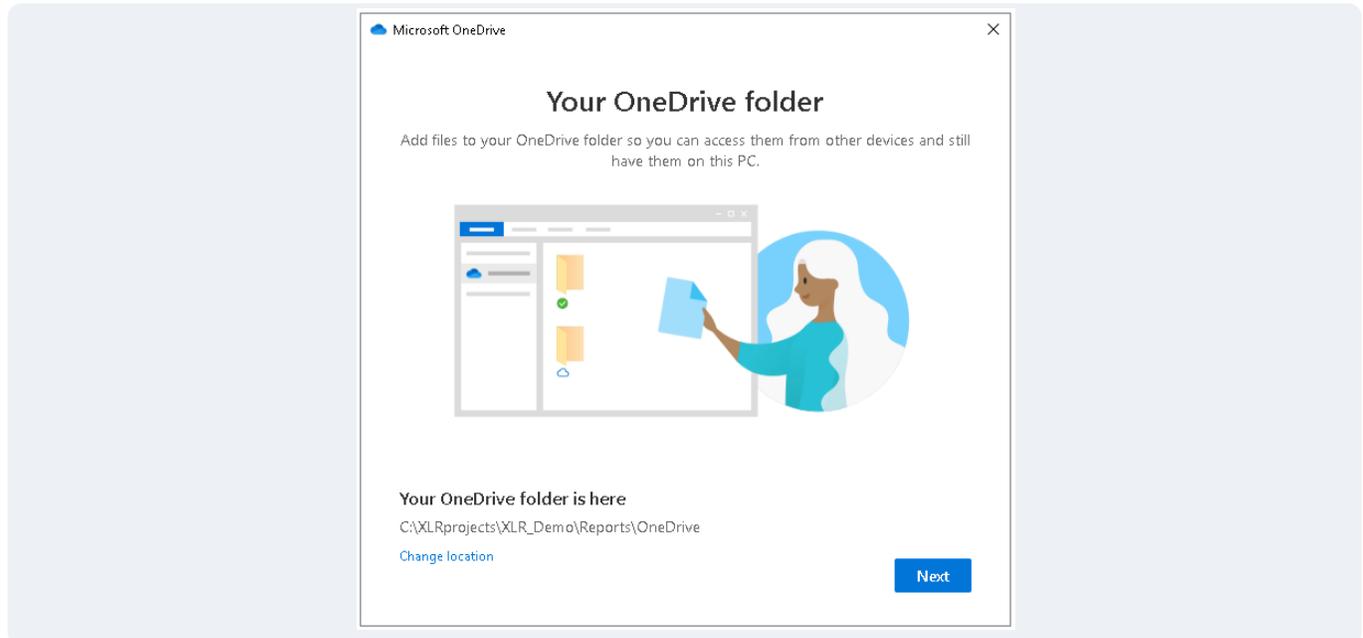


Inside each of these report folders, separate subfolders are created for each report template.

Configure Cloud Synchronization

Microsoft One-Drive

OneDrive is built into the Windows operating system. Search or ask Cortana to open OneDrive, and sign into your OneDrive account.



Click *Change Location*. To sync all **XLReporter** reports automatically with OneDrive, select **Change Location** and browse to the project folder, e.g. `C:\XLRprojects\XLR_Demo`. Click **Next**.

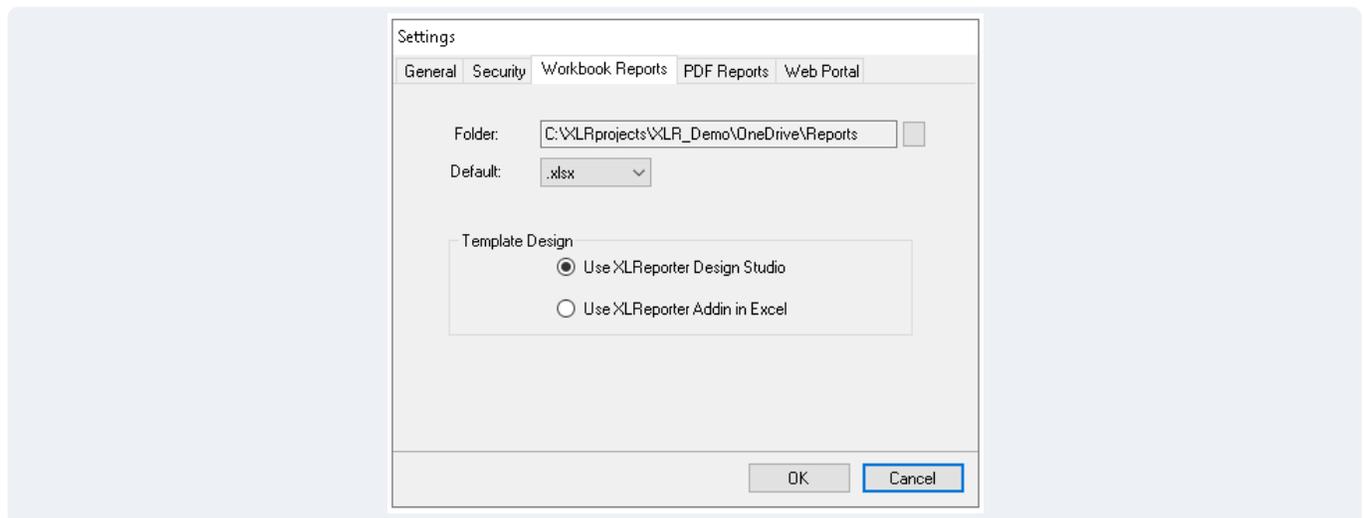
In the next step the dialog **Sync your OneDrive Files to this PC** will appear. It is suggested that the **Sync all files and folders in OneDrive** is *unchecked*.

Continue with the setup by clicking **Next** until the **Your OneDrive is ready for you** appears.

Click **Open my OneDrive folder**. This creates the `\OneDrive` folder into the project directory.

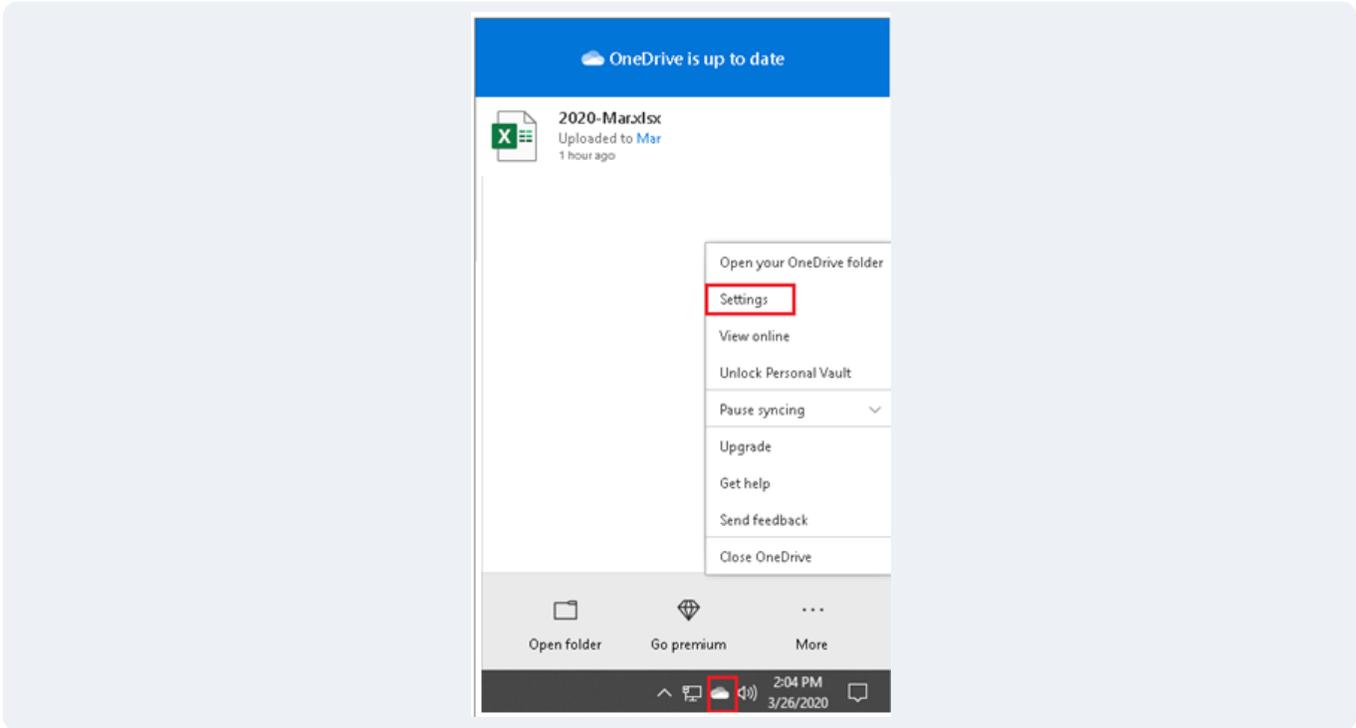
Modify the Project

The OneDrive folder now has to be referenced in the XLReporter project. Open the **XLReporter Project Explorer**, select the **Project tab** and open **Workbooks**.

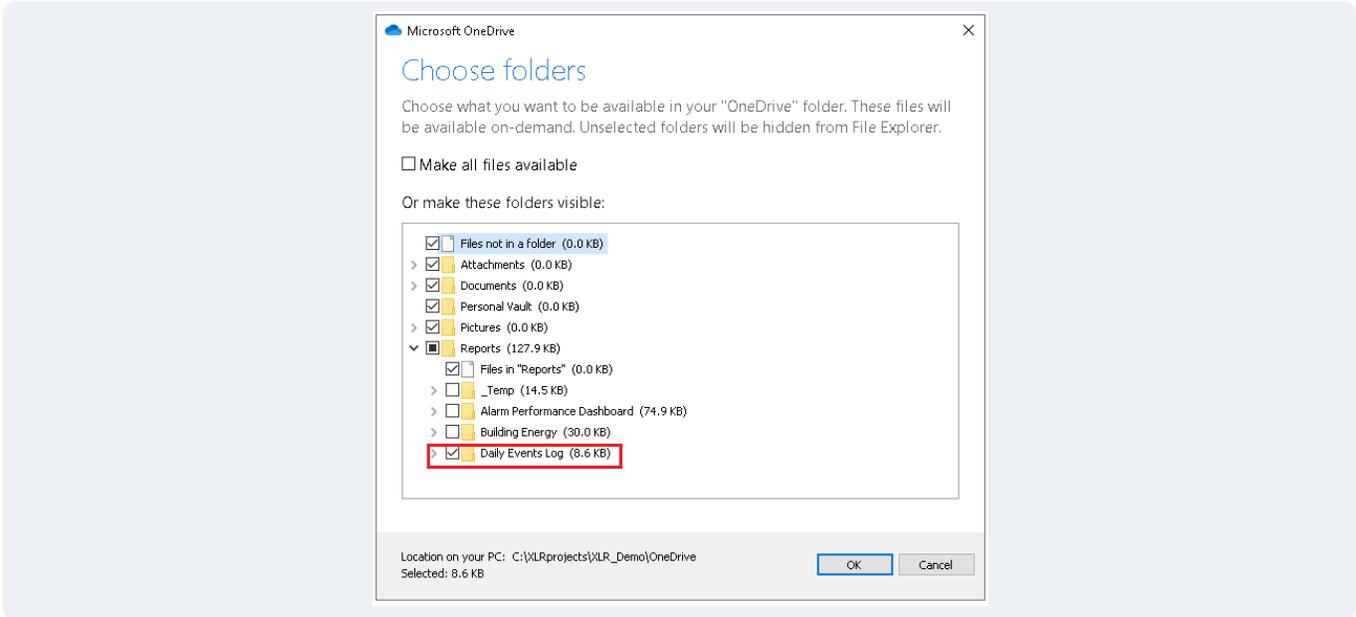


Set the **Folder** to the `\OneDrive` folder in the project. Now, when reports are updated, they will be updated inside the OneDrive and synced to the cloud automatically. This process can be used with PDF and HTML report folders as well.

To customize the OneDrive file transfer, open the OneDrive by right-clicking the icon in the lower right of the Windows task bar.



To limit the sync to specific **Report Templates** in the report directory, select **More**, and then **Settings**. Select **Choose Folders**.



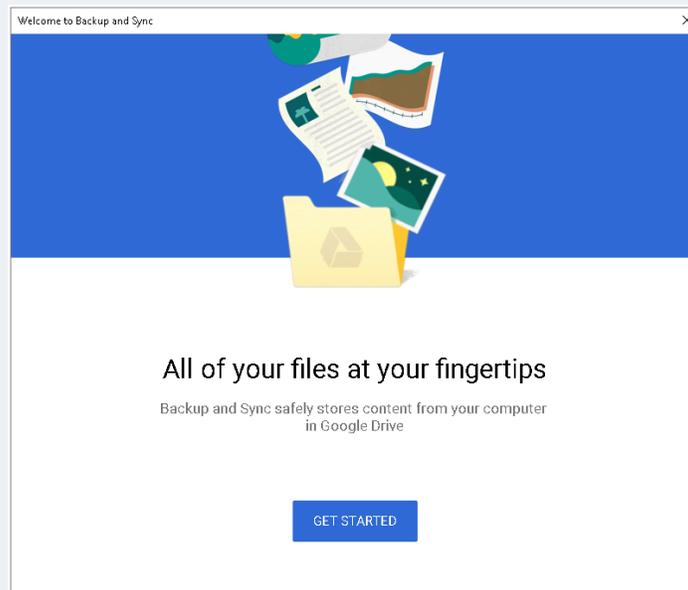
Within the **Reports** directory, disable the sync operation on the undesired subfolders by using the checkbox controls.

With files on the cloud, any client can view/modify their content from a desktop or mobile phone.

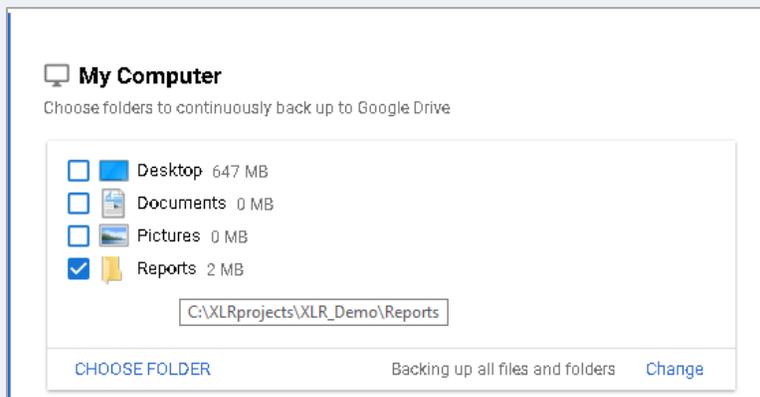
Google Drive

Google drive, like OneDrive, is also a cloud based for file sharing.

Install the application "Backup and Sync by Google", and sign into your Google account.

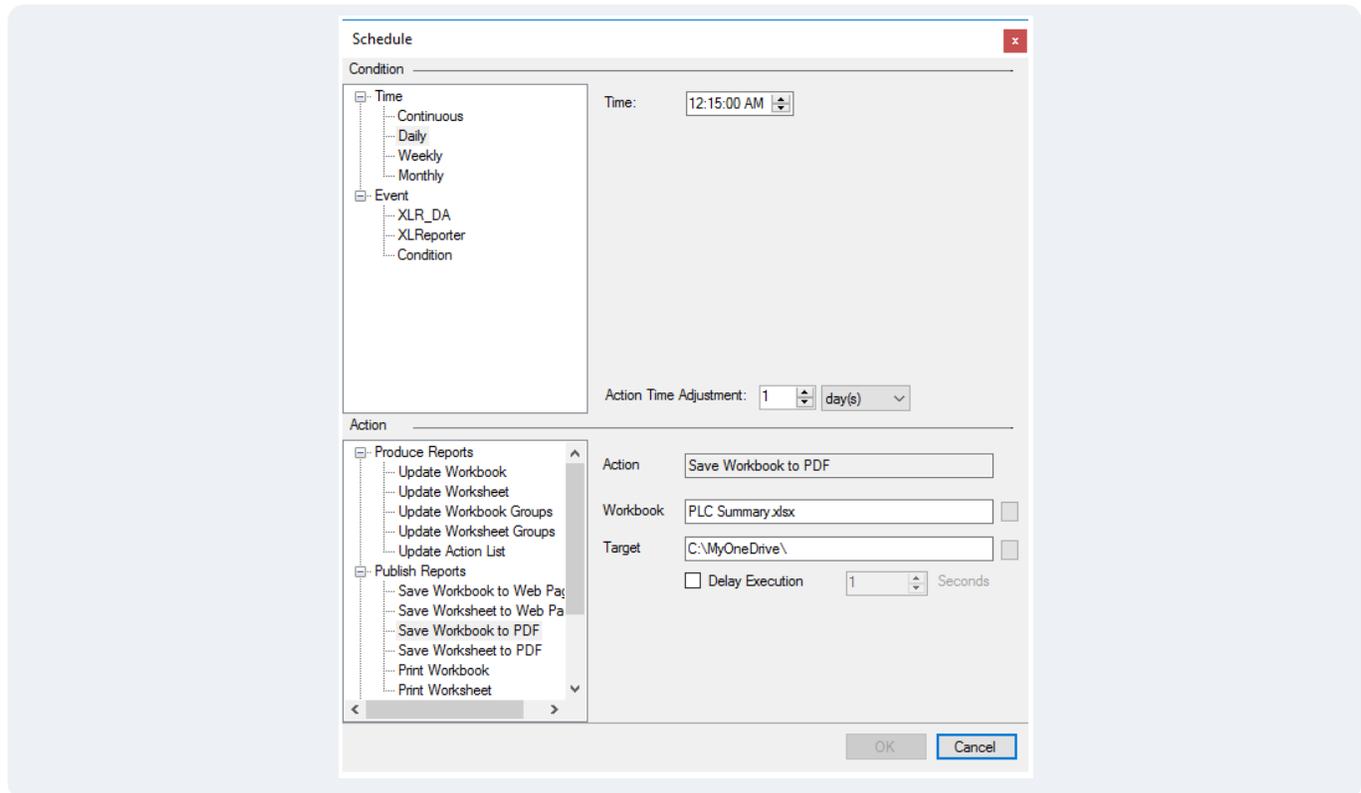


Select **Choose Folder**, and then select one of the project report folders, or specific template subfolders.



Publishing Outside of the Project

If the OneDrive/Google Drive folder is outside of the project directory then use a **Schedule Action** to copy reports to it automatically.



The following **Actions** use a **Target** parameter to specify the file path and file name of the published report.

- *Save Workbook to HTML*
- *Save Worksheet to HTML*
- *Save Workbook to PDF*
- *Save Worksheet to PDF*
- *Move a Workbook*

If the **Target** ends in a “\” then the file is created in the specified directory using the **Report Names** settings in the **Report Template**, e.g. *PLC Summary_2020_03_25.pdf*.