



Reporting On Demand

While there are many reporting requirements that can be solved by automatically generating reports, there are many times when a report is required by a user entering some parameters and generating that report right there, on the spot.

For these particular requirements, **XLReporter** has provided a set of tools you can use to develop reports that users can interact with and get immediate results.

With **XLReporter** Team edition, the interactive reporting functionality extends from the machine where **XLReporter** is installed to any machine across the network without any additional software.

The following describes the steps necessary to configure an interactive report.

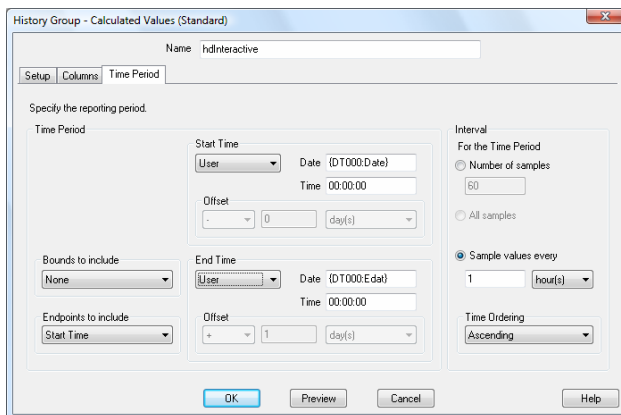
Defining Connections

Typically, an interactive report is derived from historical, analytic or database data.

The first step in designing an interactive template is to define the history group(s), analytic group(s) or database group(s) that will retrieve the data for the report.

For settings that should be specified by the user at the time of report execution, specify one of **XLReporter's** variables.

A good example of this is setting up a history group where the user can specify the start and end dates. To achieve this, set the Start Time and End Time of the history group to **XLReporter** variables.

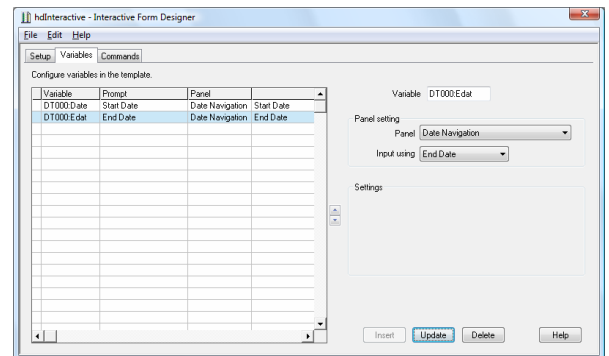


History Group Builder with variables

Designing the Interactive Form

Now that you have defined your group(s) that contain variables in the report template, the question becomes, how does the user access the variables without editing the settings directly? The answer is, by designing an interactive form in **XLReporter's** Interactive Form Designer which is available from **XLReporter's** Interactive Design menu option in Excel.

When the Interactive Form Designer is opened from a template, you are presented with the variables used in the template. This list consists of every unique variable you have used in any history group, analytic group or database group connected to the report template.



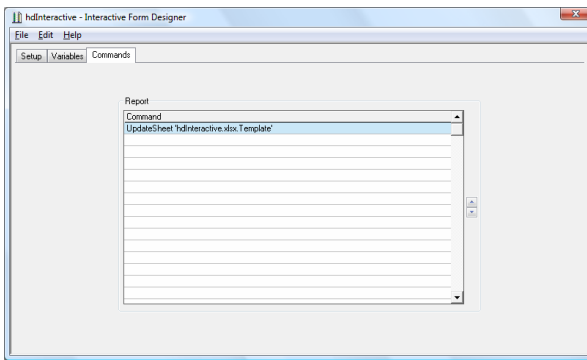
Interactive Form Designer – Variables Tab

For each variable, you specify the panel to present the variable in. Available panels include:

- **Date Navigation**
A panel specifically designed for the user to enter a time period.
- **Tag**
A panel specifically designed for the user to specify tags from a historian.
- **Parameters**
A general panel with multiple controls to support a variety of different variables.
- **Database**
A panel presenting the results of database query that can be used as values for the variables.

Depending on the panel selected, additional information may be required including the type of control to present (e.g., a text box, a date picker, etc.) and the Prompt displayed to the user for the value.

Once all the variables have been defined, you'll need to define the commands that will be used to generate the report. This is done under the Commands tab.



Interactive Form Designer – Commands Tab

By default, an UpdateSheet command is configured for every interactive report. This is the command that will generate the entire report. Typically, this is the only command needed.

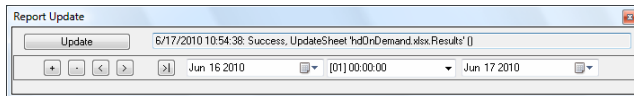
Finally, under the Settings tab, you can configure some custom settings for the interactive form.

The Form Caption setting allows you to specify the text that will appear at the top of the interactive form's window when it is launched.

Interactive Reports within Excel

The interactive form you designed is accessible in Excel from the **XLReporter** menu by selecting Report, Update.

You are presented with a form based on the settings configured.



Interactive Report Form in Excel

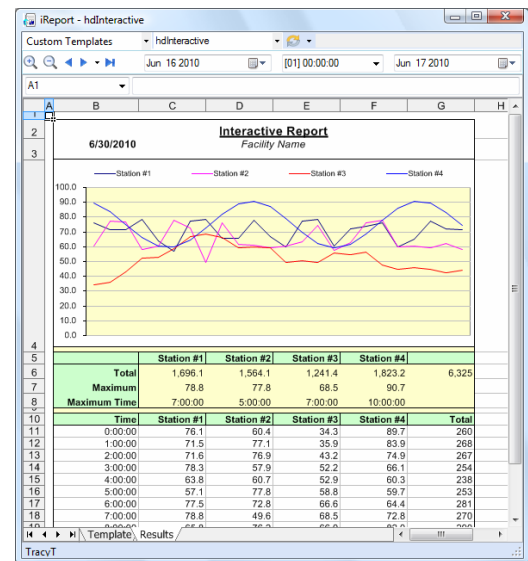
Simply specify the values and generate the report. A new report will appear in the open Excel template.

Interactive Reports from outside Excel

From outside Excel, the interactive form is also available. You can access it from the Project Explorer by selecting Interactive Reports, from a command line by running XLRxReport.exe or from a pushbutton from a HMI display by launching XLRxReport.exe.

When launched, the iReport window appears. If installed with the project, standard charts and templates are available from the Predefined Charts and Predefined Templates lists. Any interactive report you configure will appear under the Custom Templates list.

Once selected, all the panels configured for the report appear. Simply specify the settings and update the report.



Interactive Report Form outside of Excel

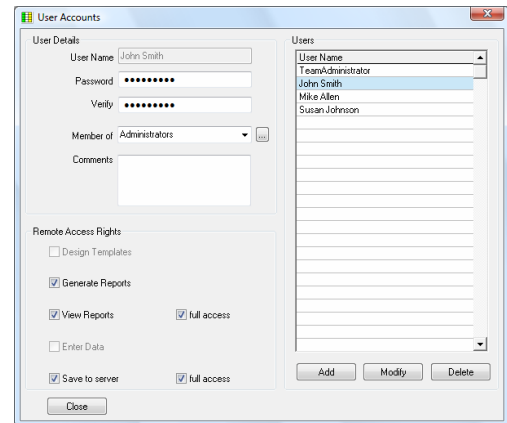
The report is updated and presented in an Excel-like environment.

Reports can be printed by selecting the drop-down option to the right of the Update button.

Interactive Reports from Team Clients

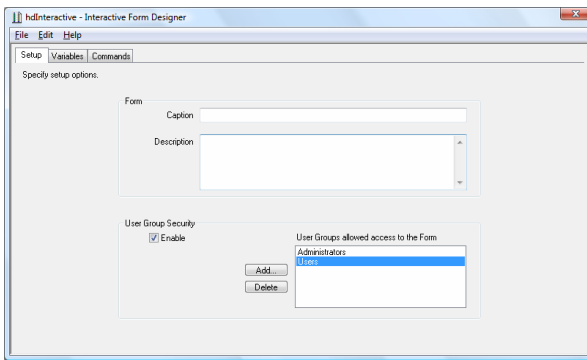
If you have **XLReporter** Team edition, interactive report configured on the Team server can be accessed from any Team client machine.

A user security layer has been implemented as part of Team edition. A set of users can be configured on the server. These are the users that can log in and run reports from the Team clients.



This is accessible in the Project Explorer under the Edit menu. Each user can be set up as a member of a specific user group that you can configure.

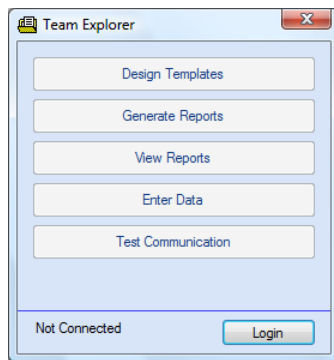
As part of designing each interactive form on the server, User Group Security can be enabled.



Interactive Form Designer – Setup Tab

This is configured under the Setup tab of the Interactive Form Designer. This allows you to determine which user groups can access each interactive template.

From the Team clients, the interactive form is available from the Team Explorer by clicking Generate Reports.



Team Explorer

This launches the iReport application. The list of interactive templates presented is based on the login credentials of the user.

Once a report is generated, it can be annotated and published back to the server so that others can access it.

This is done by selecting the Save As option from the drop-down menu to the right of the Update button.

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