



ProjectWorX

Automatic Project Documentation



APPLICATION NOTE

August 2014

Description: Guide to setup automatic project documentation in Workbench-SL.

General Requirement: Working knowledge of GENESIS64, and Workbench-SL. Installation of SQL Server with Reporting Service (SSRS).

Introduction

In the latest release of GENESIS64 v10.85, we introduce a state-of-art reporting service called Project Reporting in our integrated management platform Workbench-SL. The purpose of this tool is to analyze the system and collect points used by the system and points exposed by the system. This automated report service utilizes the reporting technologies offered by the latest Microsoft SQL Server and helps users by validating the points and checking their qualities and values which are used by many service providers in the GENESIS64 suite.

This application note is based on the assumption that the reader has acquired the essential working knowledge of GENESIS64, particularly Workbench-SL. If you want to find out more details on Workbench-SL or GENESIS64, please refer to other related application notes provided on the installation disk.

Installing and Configuring SQL Service Reporting Service (SSRS)

As aforementioned, Project Reporting Service is based on SQL Server Reporting Service (SSRS) therefore it is essential to have SSRS installed and configured before you can fully leverage the advantage of Project Reporting Service. If you have pre-installed and configured SSRS, you can skip this section and follow the next section to start configuring Project Documentation. Otherwise, please follow the instructions below to get started with SSRS.

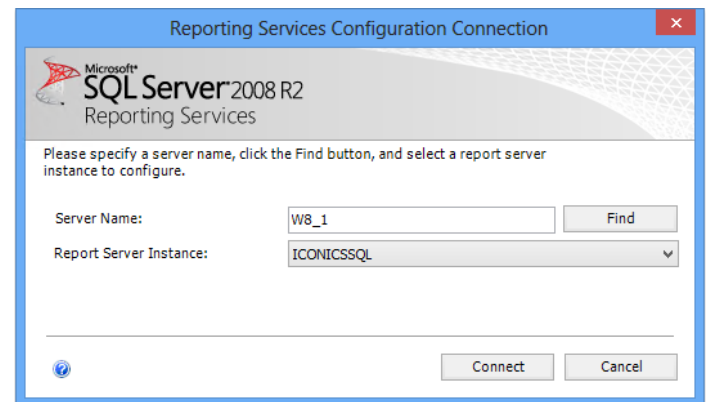
Installing SQL Reporting Service

1. Make sure you have either an installation disk/file of SQL Server standard version or SQL Server Express with Advanced Service available.
2. Run SQL setup from the disk or SQL Server Installation Center on your machine.
3. On the popup, click on Installation on the right and then click on "New installation or add features to an existing installation"
4. Proceed with preliminary checkers and support file installation.

5. When you hit installation type page, select "New installation" if you don't have SQL server installed on your machine. If you have SQL server installed already, select "Add features" and select your installed instance.
6. In Feature selection, make sure you check "Reporting Services" under Instance Feature.
7. Proceed to Server Configuration where you need to specify service account for SQL server and SQL server reporting service, you can them to whichever you prefer. If you need more information on those service accounts, you can refer to MSDN: <http://msdn.microsoft.com/en-us/library/cc281953.aspx>
8. On Reporting Services Configuration page, you can leave "Install the native mode default configuration" checked.
9. Continue with the setup and finish the installation.
10. You may need to reboot your machine after the installation if it prompts to do so.

Configuring SQL Reporting Service

1. Open Reporting Services Configuration Manager under SQL Server folder from Start→All Programs.
2. On populated Reporting Service Configuration Connection dialog, enter your SQL server name, and select the Report Server Instance and then click Connect.



3. Click through the sub tabs on the left panel to configure the essential parts for Reporting Service to be running, mainly Service Account, Web Service URL, Database, and Report Manager URL. The rest of the settings can be optional.
4. For instance, make sure you have a valid URL for Report Server Web Service under Web Service URL.

Report Server Web Service URLs

URLs: http://W8_1:80/ReportServer_ICONICSSQL



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5. Make sure you also have a valid URL for Report Manger Site Identification.

Report Manager Site Identification

Virtual Directory:

URLs: http://W8_1:80/Reports_ICONICSSQL

6. Apply the changes.
7. Lastly make sure your Reporting Service has started under the top tab on the left panel.

Current Report Server

SQL Server Instance:	ICONICSSQL
Instance ID:	MSRS10_50.ICONICSSQL
Edition:	STANDARD EDITION
Product Version:	10.50.1600.1
Report Server Database Name:	ReportServer\$ICONICSSQL
Report Server Mode:	Native
Report Service Status:	Started

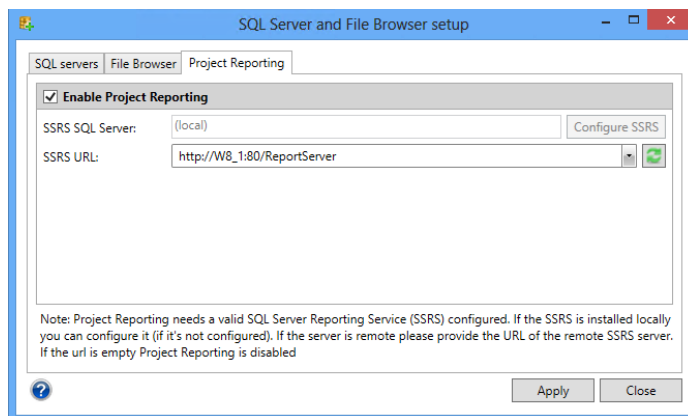
Configuring Project Documentation in Workbench-SL

Before proceeding with configuring Project Documentation in Workbench-SL, we need to make sure "ICONICS Workbench-SL Configuration Service" is started.

1. Go to Control Panel → Administrative Tools → Services.
2. Find ICONICS Workbench-SL Configuration Service and make sure it's started.

Once we make sure both SSRS and ICONICS Workbench-SL Configuration Service are started, we can then enable Project Reporting Service and map it to the SSRS service.

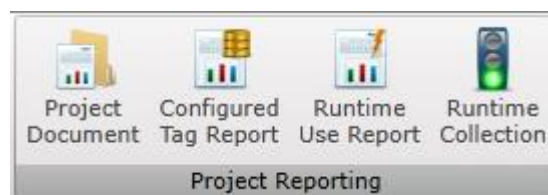
1. Go to Start → All Programs → ICONICS → Tools → SQL Server Setup.
2. Click on "Project Reporting" tab.
3. Check "Enable Project Reporting".
4. You can either click on the dropdown list or click on the refresh button to get the available URL.



5. Once you have URL filled in, click on Apply to save the change.
6. Close the SQL Server and File Browser Setup dialog.

Now we can start configuring Project Document

1. Open Workbench-SL.
2. Click on ProjectWorX tab.
3. Click on Project Document button in Project Reporting section.



4. Click on Next on Report Wizard.
5. Under General Settings, you can enter some descriptions for your report task, title of the project and author name. These are essentially inherited from the Project Properties section right to Project Reporting section.



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Project Document

General Settings

Task Description: Project Report

Project Title: My Project

Project Version: 01.00.000.00 Author: Jimmy

Select Cover Template: Default Cover Page

Select the reports for your project document

Report Name	Selected
[AssetWorX] All Properties	☒
[AssetWorX] Dynamic Tags	☒
[AssetWorX] Expressions	☒
[AssetWorX] Polled Dynamic Tags	☒

Please click "Next" to continue

Back Next Close

- The table in the lower part offers you a variety of reports for execution. You can check whichever you want to generate report on and hit next.
- By default, AssetWorX and BACnet are the only two active providers that can be used to generate report on.

Please select the active configurations used to generate the Availability Report

Provider	Host	
☒ AssetWorX	localhost	...
☒ BACnet	localhost	...

- Click on next
- Check Validate collected tags, you can leave the settings as they are.
- Click on Finish
- You will see a task bar popping up on the right side which indicates the progress of reporting execution.

Task Explorer | Actions ▾

Recent Tasks (1)

Default_20140721.3 Product Documentation

7/21/2014 5:59:09 PM

Running - 11%

- Upon its completion, right click on the task will provide a few options

Open

Download PDF

Download Excel

Download Package

Show task explorer

View Log

Cancel

Retry

Delete Task

- On clicking open, the Project Documentation will populate in the middle panel for you to view.
- On clicking Download PDF will let you open or save a copy of the report in PDF.
- View log will provide you a detailed transaction log in the middle panel with which will be helpful for you to locate the error if there is any occurs during the report execution.

Default_20140721.3 Product Documentation

Default_20140721.3 Product Documentation - Task Succeeded

System triggered "Default_20140721.3 Product Documentation". Ran for 0.6 minutes, completed 4 minute(s) ago

Task Log ☒ Enable automatic updates

7/21/2014 9:59:13 PM	Started collecting data for AssetWorX...
7/21/2014 9:59:15 PM	Saving collected data to report database...
7/21/2014 9:59:16 PM	Ok
7/21/2014 9:59:16 PM	Started collecting data for BACnet...
7/21/2014 9:59:21 PM	Saving collected data to report database...
7/21/2014 9:59:21 PM	Ok
7/21/2014 9:59:21 PM	Started validating points...
7/21/2014 9:59:24 PM	Saving validation results for 10 points...
7/21/2014 9:59:24 PM	Loading report file [C:\ProgramData\ICONICS\Reporting\CoverPages\DefaultCoverPage.rdl]...
7/21/2014 9:59:28 PM	Loaded successfully with no warnings

Retry To Clipboard... PDF Excel Package

These are the essential steps to successfully setup and execute a Project Documentation. If you are interested in learning more details on Project Reporting, please refer to application note – *ProjectWorX – Project Reporting and Diagnostics* where we will discuss the architecture of project reporting and compare different types of reports that we offer.