



ReportWorX

ReportWorX 365



APPLICATION NOTE

October 2015

Description: Guide to using ReportWorX 365.

General Requirement: GENESIS64 version 10.9 or higher, Excel 2013 Service Pack 1 or higher or Office 365.

Introduction

ReportWorX 365 is an add-in feature for Microsoft Excel that allows easy access to real-time and historical data repositories from the GENESIS64 product suite. It is available from the Office app store and can be used with Office 365 or Office 2013 SP1 and later versions. It has improved deploy-ability, updatability and manageability compared with ReportWorX Express.

Adding ReportWorX 365

ReportWorX 365 App for Office carries a light footprint and doesn't actually need to be installed on the computer. It runs inside Excel in a secure app runtime environment and interfaces to data using standard REST APIs.

ReportWorX 365 can be easily deployed from the Office App store:

- Open Excel and navigate to **INSERT** menu item
- Click on **My Apps** button and it will open Apps for Office window
- Click on **STORE** and search for ReportWorX or ICONICS
- Add the ReportWorX for Office App by selecting **Trust It** button
- Now this App will be listed under **MY APPS** and will also show under Recently Used Apps

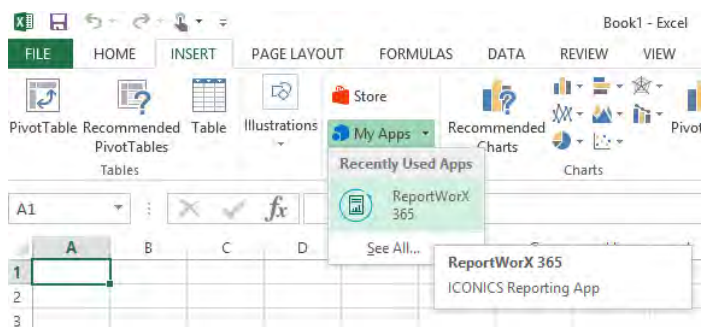


Figure 1 – ReportWorX 365 in Excel

Configuring ReportWorX 365

To create a new report, click on ReportWorX 365 and it will open a side tab in Excel window.

ReportWorX 365

Figure 2 – ReportWorX 365 home page

1. In *Server Name* box provide the name for ICONICS GENESIS64 server (e.g. *localhost* if running locally on GENESIS64 server).
2. Check *Use Secure Connection* if server is using https
3. In *Ports* box add port number. Leave empty if using standard ports
4. Select data from *Available data sources types*:
 - *Current Values* - (OPC Real-time Data) - Provides access to current data values
 - *Dimension Data* (dates, assets, etc.) - for easier pivoting
 - *Energy Data* - (Energy AnalytiX) - Provides access to energy data
 - *Fault Data* - (Facility AnalytiX) - Provides access to fault causes and incidents.
 - *Historical* - [HDA (Hyper Historian, TrendWorX64, AlarmWorX64)] - historical data and alarms



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6. After selecting data source; data is exported to the currently selected cell and does not require the user to select cell ranges
7. Data is exported as a table and it builds column names dynamically

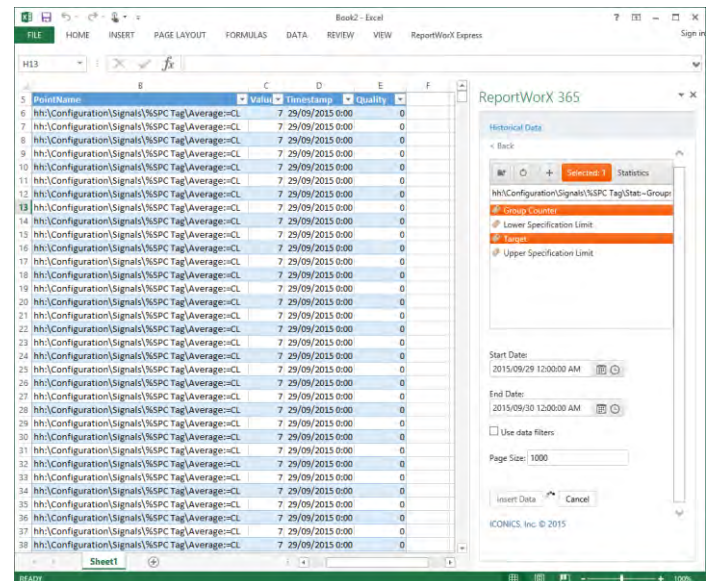


Figure 3 - Data Selection