



ProjectWorX

Automatic Project Documentation



APPLICATION NOTE

October 2015

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

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

Introduction

In GENESIS64 we include a state-of-art reporting service called Project Reporting in our integrated management platform ICONICS Workbench. The purpose of this tool is to analyze the system and to collect points used and 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 ICONICS Workbench. If you want to find out more details on ICONICS Workbench 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.

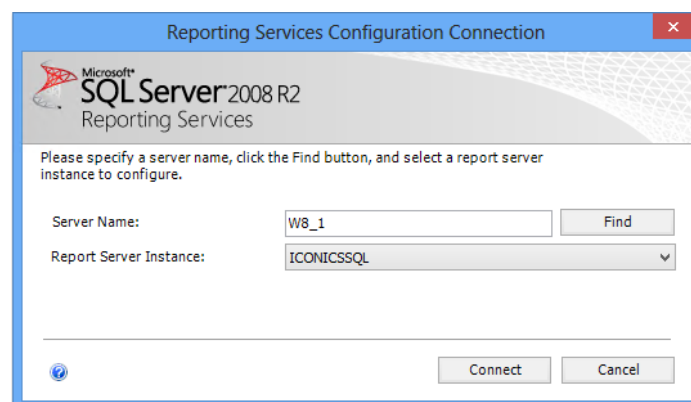


Figure 1 - Reporting Services Configuration Connection

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.

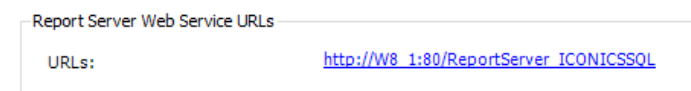


Figure 2 - Report Server Web Service URLs



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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

Figure 3 - Report Manager Site Identification

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

Figure 4 - Report Server Status

Configuring Project Documentation in ICONICS Workbench

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

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

Once we make sure both SSRS and ICONICS Workbench 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.

SQL Server and File Browser setup

SQL servers | File Browser | Project Reporting

☒ Enable Project Reporting

SSRS SQL Server:

SSRS URL:

Note: Project Reporting needs a valid SQL Server Reporting Service (SSRS) configured. If the SSRS is installed locally you can configure it (if it's not configured). If the server is remote please provide the URL of the remote SSRS server. If the url is empty Project Reporting is disabled

Figure 5 - Enabling Project Reporting

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 ICONICS Workbench.
2. Click on ProjectWorX tab.
3. Click on Project Document button in Project Reporting section.

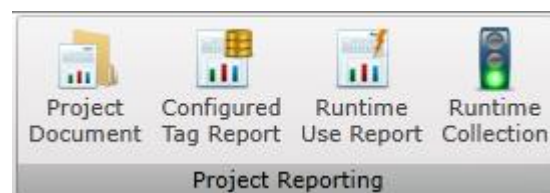


Figure 6 - Project Reporting section

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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Figure 7 - Selecting reports

- 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.

Figure 8 - Selecting configurations

- 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.

Figure 9 - Report progress

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

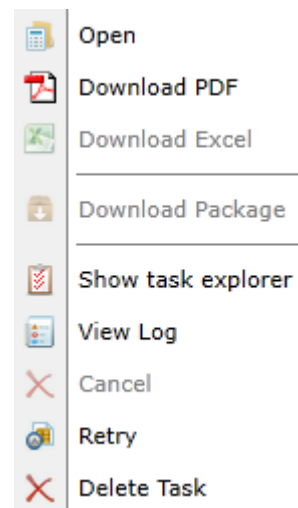


Figure 10 - Context menu

- 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.

Figure 11 - Transaction log

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.