



ReportWorX 365 Stand-Alone Installation



APPLICATION NOTE

November 2015

Description: Guide to installing ReportWorX 365 into Microsoft Excel using a provided downloaded file from ICONICS.com

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

Introduction

ReportWorX 365 is an App for Office available for download from the Microsoft Office Store. It allows easy access to real-time and historical data repositories from the GENESIS64/AnalytiX/Hyper Historian product suites. Customers are encouraged to download and install the app from the Office Store, however, for those who cannot do so due to IT restrictions or other limitations, this Application Note provides instruction on how to download ReportWorX 365 from ICONICS.com and install that file into Microsoft Excel.

The ReportWorX 365 App for Office can be used with Office 365 or Office 2013 SP1 and later versions. It has improved deployability, updatability and manageability compared with ReportWorX Express. It runs inside Excel in a secure app runtime environment and interfaces to data using standard REST APIs.

Procedure

1. Make sure to have Microsoft Office 2013 SP1 installed locally.
2. Download the file, **ICONICS ReportWorX 365.msi**, from ICONICS.com. Contact ICONICS for the download location.
3. Once you have downloaded the installation file to your machine, double-click on **Setup** to start installation.
4. You can now sideload the app. Open Excel.
5. Go to File → Options → Trust Center → Trust Center Settings → Trusted App Catalogs.
6. In the Catalog Url field, type in the FOLDER path of your manifest file (called **ReportWorX365.xml**) using the syntax:

**\\.\C:\Program Files\ICONICS\GENESIS64\WebSites\
ReportWorX365Web**

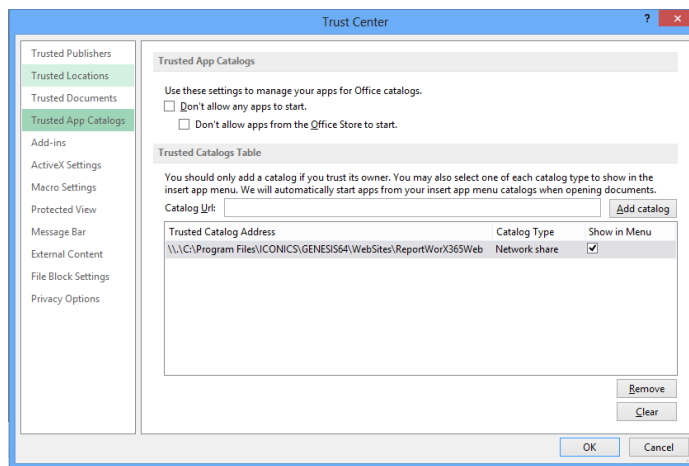


Figure 1 – Microsoft Excel Trust Center Settings

7. Click on **Add Catalog**. Check the **'Show in Menu'** check box, then click **OK**.
8. Close and then reopen Excel.
9. Go to Insert → My Apps → See All... dropdown.

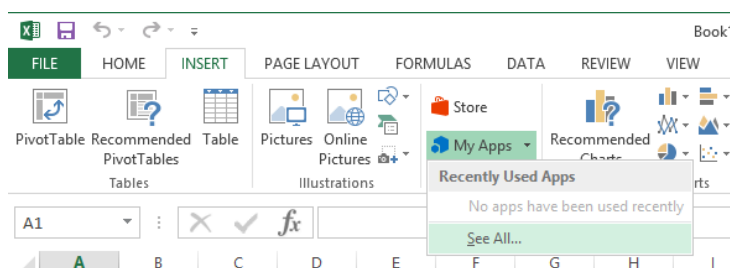


Figure 2 - Inserting an App for Office in Microsoft Excel

10. In the 'Apps for Office' dialog, go to 'Shared Folder' and click on **Refresh**. Select the **ReportWorX 365 App** and click on **'Insert'**.



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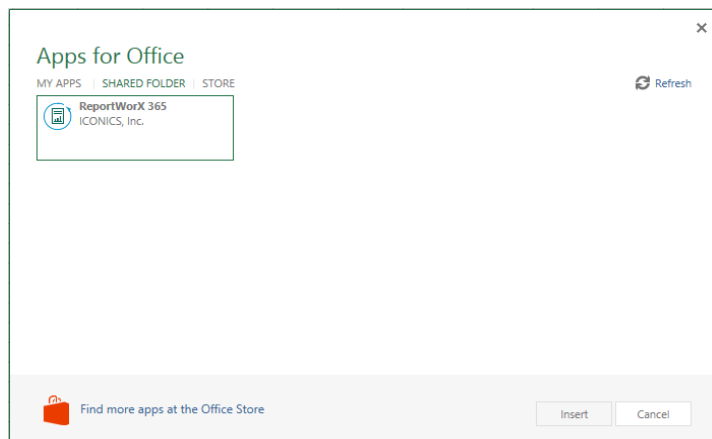


Figure 3 - Apps for Office – Shared Folder Selection

11. You will now see ReportWorX 365 loaded into the bottom right panel of Microsoft Excel, as shown below. For more information on how to use ReportWorX 365, consult the ICONICS Product Help included in your ICONICS product installation.

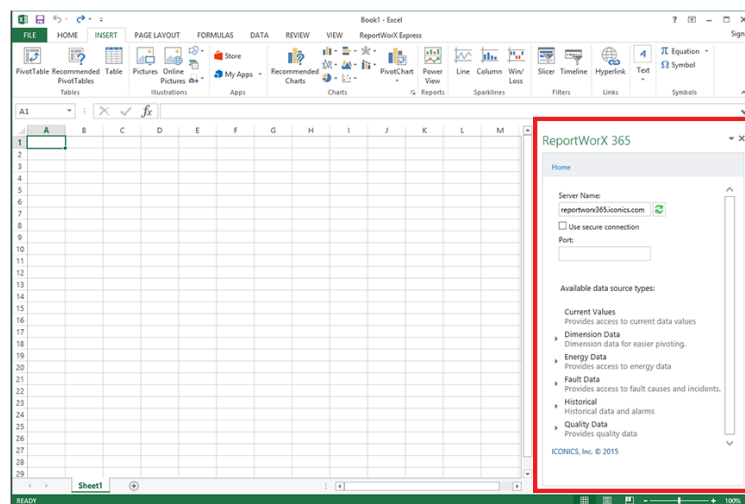


Figure 4 - ICONICS ReportWorX 365 Loaded into Microsoft Excel

12. Some users might need to enter the machine name instead of 'localhost' in the Server Name textbox. If the server does not use https for the OData Connector Point Manager, uncheck 'Use Https'. The OData Connector Point Manager uses 'http' by default and the checkbox should be unchecked. Click on **Refresh** (you may need to do this more than once).