



Workbench

Troubleshooting with Project Reporting



APPLICATION NOTE

October 2015

Description: This application note is designed to give you an introduction on how to troubleshoot your project with the Project Reporting tool.

General Requirement: Workbench version 10.90 or later, Microsoft SQL Server.

Project Reporting requires the Native Reporting Service feature of SQL Server. This is included in SQL Server Enterprise editions and is not typically installed with SQL Server Express by default. However, if you install SQL Server Express as part of an ICONICS 10.90 or later installation, this feature of SQL is included.

If your system had SQL Server Express already installed before you installed ICONICS, then you will need to manually install the Native Reporting Service feature.

Introduction

If you want to look at your Project as a whole and see its current status, as opposed to looking at a specific provider, you can use Project Reporting. It is a very handy tool that can generate reports in PDF as well as Excel formats about the different providers, state of communication, and more.

Configuring Project Reporting

1. Open the Workbench.
2. When Workbench opens, MyProject will be selected by default on the Project Explorer pane.
3. In the Ribbon, click on the ProjectWorX tab.
4. Click on SSRS Configuration. A window will pop up similar to Figure 1.

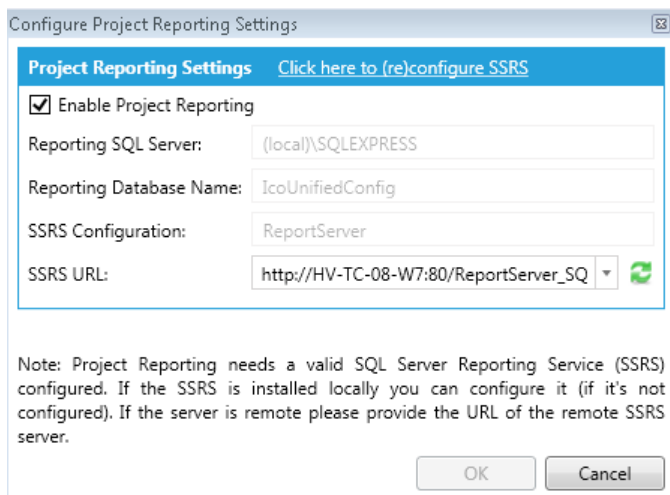


Figure 1 - Project Reporting Settings

5. Check the Enable Project reporting checkbox, specify the SSRS URL, and click OK. Project reporting is now configured on your system.

Creating a Project Document

A project document is a document that gives you an overview of what is installed and what tags are configured on your system. It is a comprehensive document that also contains information about your BACnet devices, your Energy AnalytiX data, and so on (if applicable).

1. To create this document, select your project ("MyProject" by default) in the Project Explorer pane, and click on the Home tab in the Ribbon.
2. In the Tools section, click on Project Document. The Report Wizard will pop up. Click Next. You will see a window similar to Figure 2.

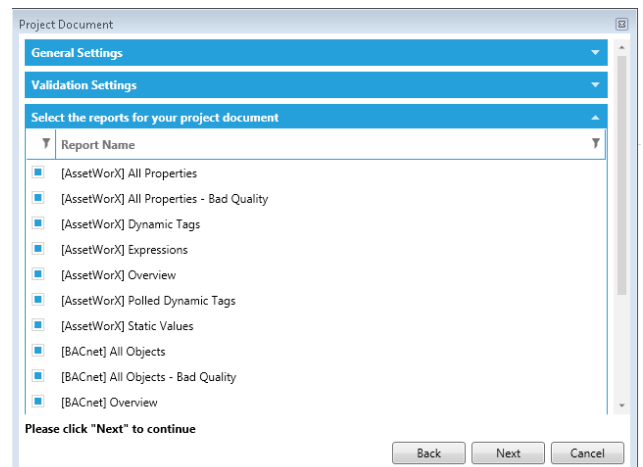


Figure 2 - Project Document window

3. Here you can see the different providers, and apply filters and settings accordingly.
4. To validate your tags, click on the Validation Settings pane and check the "Validate collected tags" checkbox.
5. To change any General Settings, click on the General Settings pane. In this pane you can configure descriptive information for the report, select a cover template, and choose whether to include details on the installation and installed files.
6. When you are done applying changes, click Next. You will encounter a window that has AssetWorX and BACnet selected. You can apply additional filters here by clicking on the ellipsis button (...) next to either AssetWorX or BACnet. You can select particular assets/devices if you do not want to generate the report for all the devices/assets.
7. Once you are done selecting changes, click on Finish. It will put a report in the Queue for you.



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8. You can view the report item in the Recent Tasks pane on the right. By default the pane on the right is the Data Browser, but you can switch it to Recent Tasks by clicking on "Recent Tasks" at the bottom of the pane. You should see something similar to Figure 3.

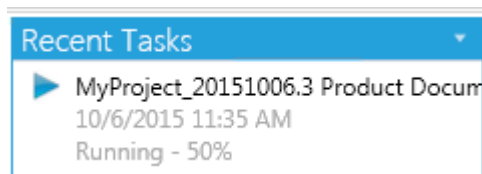


Figure 3 - Queued project report

9. You can right click on the report item and view the log that shows what happened as the document got created (select "View Log") or view the document itself by clicking "Download and Open PDF".

Generating a Configured Tags Report

In Workbench, you also have the ability to view all the tags you have configured in your project – this can help you identify which points have gone bad without actually having to navigate to that point through the Project Explorer. Generating a configured tags report is as simple as creating a project document.

1. To create this document, select your project ("MyProject" by default) in the Project Explorer pane, and click on the Home tab in the Ribbon.
2. In the Tools section, click on Configured Tags Report. The Report Wizard will pop up. Click Next. You will see a window similar to Figure 4.

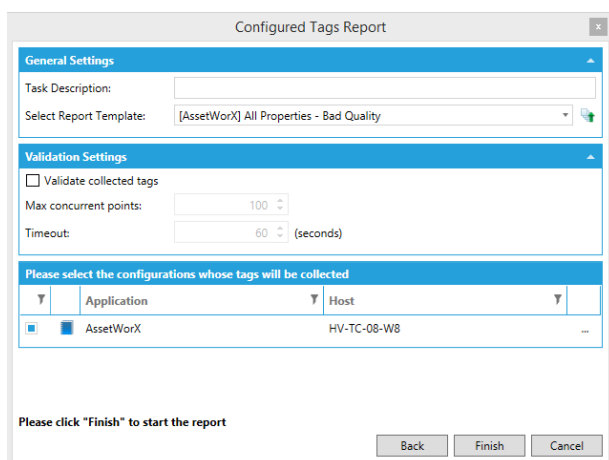


Figure 4 - Configured Tags Report window

3. In the General Settings pane, you can specify the Task Description. You can also select a report template from the preconfigured options for AssetWorX and BACnet. Select a template.
4. In the Validation Settings pane, you can choose to validate your collected tags.
5. In the bottom pane, you can select which configurations to report on. There is an ellipsis button to the right of each Application name, and you can apply the appropriate filters for your report (select a particular equipment or equipment class or a particular object, for instance).
6. Once you are done applying changes, click Finish.
7. The report will be added to the queue in the Recent Tasks pane, just like the Project Document. You can see the report progress in the Recent Tasks pane.
8. You can right click on the report item and view the log that shows what happened as the document got created (select "View Log") or view the document itself by clicking "Download and Open PDF".

Generating a Runtime Use Report

This report is a collection of all the runtime data tags (similar to the configured tags report).

1. To create this document, select your project ("MyProject" by default) in the Project Explorer pane, and click on the Home tab in the Ribbon.
2. In the Tools section, click on Runtime Use Report. The Report Wizard will pop up. Click Next. You will see a window similar to Figure 5.

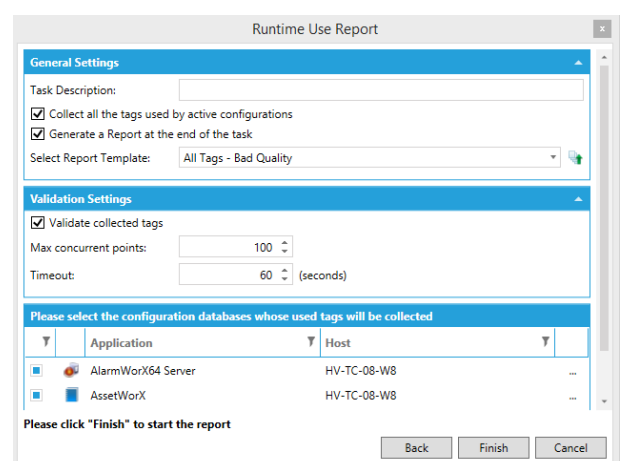


Figure 5 - Runtime Use Report window

3. Similar to the other documents, you can customize your report in this window. When you are done applying changes, click finish.
4. In the Recent Tasks pane you can see and select your report to view the log or download an Excel or PDF version of the report.