



ReportWorX 365 Getting Started



APPLICATION NOTE

September 2017

Description: Guide to using ReportWorX 365.

General Requirement: 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.

NOTE: ReportWorX 365 reports are not interchangeable with ReportWorX Express reports, and they cannot be used as templates for ReportWorX64.

Initial Setup

Adding the ReportWorX 365 App

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. Just launch the store from the Insert ribbon or go to <http://store.office.com> and search for ReportWorX 365.

When prompted, make sure to select "Trust this add-in".

Now ReportWorX 365 will appear under My Apps or in your Add-Ins tab.

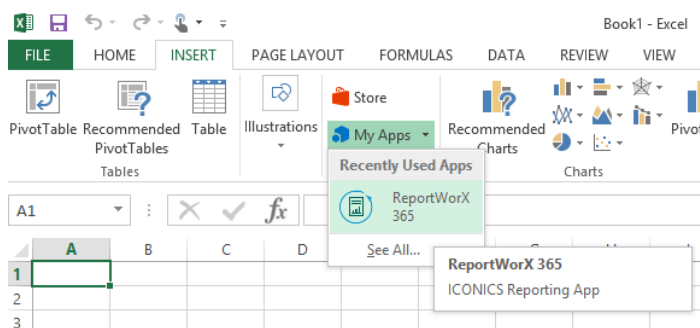


Figure 1 – ReportWorX 365 in Excel

Setting up OData Connector for HTTPS

Apps installed via the Office store must use HTTPS to communicate to backend services, even if those services are local to Excel. ReportWorX 365 is no exception. To enable HTTPS

communication between ReportWorX 365 and your GENESIS64 server, follow these steps:

1. On your server, open an elevated ("Run as Administrator") command prompt and run these two commands:

```
cd c:\program files\iconics\genesis64\instcert  
odatacert -i 443
```

NOTE: Another port can be used in place of 443, but whatever port you choose must be open in your server's firewall and must not be in use by another program.

2. In Workbench, go to the **Tools** ribbon and open **Platform Services Configuration**. Go to the **Point Managers** tab.
3. Select the "OData Connector Point Manager". In the Parameters table, set the **EndpointPort** to 443 (or whichever port you chose when you ran the command) and **EndpointProtocol** to https. Hit Apply.

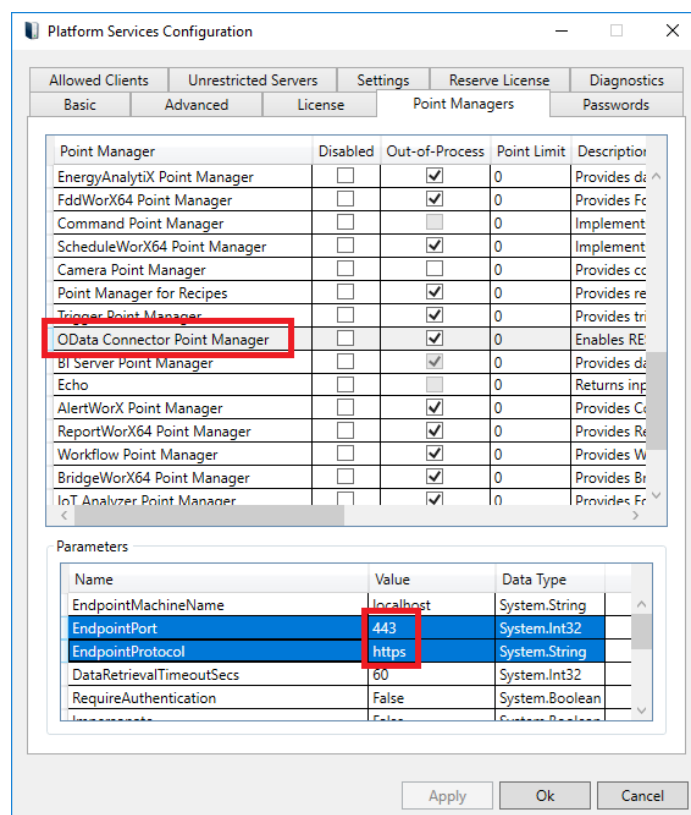


Figure 2 - Setting OData Connector Point Manager parameters

4. Go to your Services control panel and restart the "ICONICS OData Connector Point Manager" service. (Or, if the point manager is running in process, restart "ICONICS FrameWorX".)



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Using ReportWorX 365

When you launch the ReportWorX 365 app it will open a side panel in Excel.

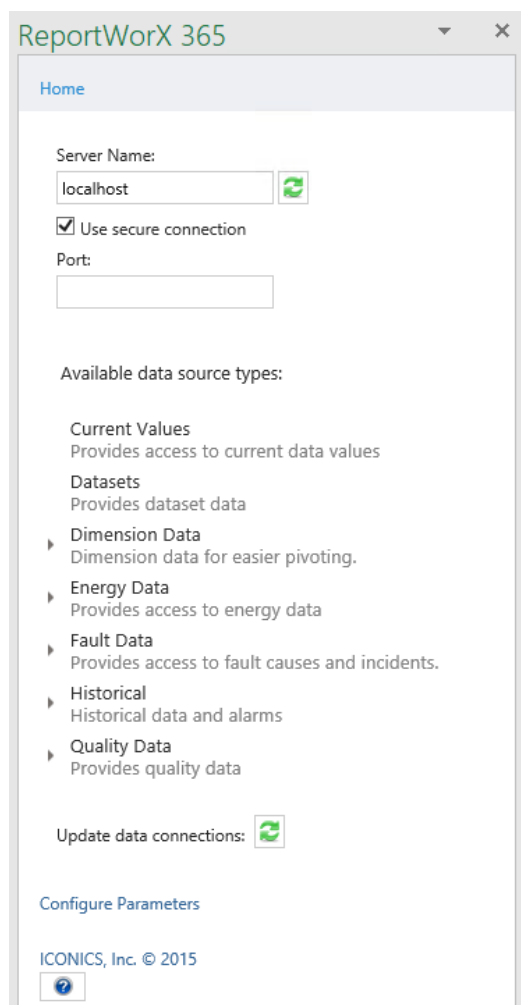


Figure 3 – ReportWorX 365 home page

1. In **Server Name** box provide the name for your ICONICS GENESIS64 server. You can use "localhost" if you are running Excel on the same machine as GENESIS64.

2. Make sure **Use Secure Connection** is checked.

NOTE: It is possible to use an unsecured connection, but only if the ReportWorX 365 app was side-loaded, rather than installed from the Office store.

3. In the **Ports** box enter your port number. You can leave this field empty to use the standard https port of 443.

NOTE: The server name and port will be remembered after you close ReportWorX 365 or Excel.

4. Select data from **Available data sources types:**
 - Current Values – Classic OPC-DA or OPC-UA-DA.
 - Dataset Data – Datasets, such as those returned by GridWorX Server.
 - Dimension Data – Provides a table of data for Assets or Dates in a format ideal for use in pivot tables.
 - Energy Data – Energy AnalytiX data.
 - Fault Data – Facility AnalytiX or FDDWorX data.
 - Historical – Classic OPC-HDA, OPC-UA-HDA and OPC-UA-HAE data, including Hyper Historian and AlarmWorX64 Logger.
 - Quality Data – Quality AnalytiX data.
5. Once you have selected a data source type you will have to supply some parameters, such as tag names or a date range.
6. If your data source accepts tags (like Current Values or Historical):
 - Double-click on a folder in the tag browser to enter the folder.
 - Select one or more tags (multiple tags can be selected using the Shift or Ctrl buttons) then hit the "+" button to add them to the Selected list.
 - Instead of using the "+" button, you can double-click on a tag to add it to the Selected list.
 - You can see how many tags you have selected by looking at the number in the "Selected" button. Click this button to see the tags you have currently selected. Use the X button to remove tags from the Selected list.

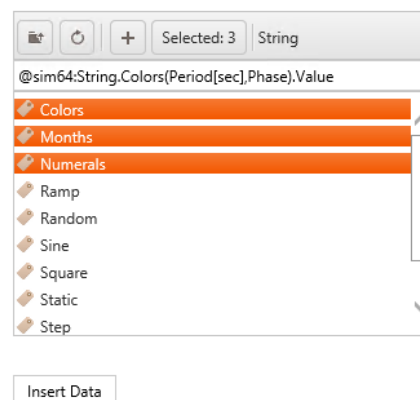


Figure 4 - Selecting tags

7. Once your data source is configured the way you want, select the cell where you would like your table of data to start, then hit **Insert Data**.
8. Your data will appear in a table in Excel.



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	A	B	C	D
1	PointName	Value	Timestamp	Quality
2	hh:\Configuration\Signals:RampFast	57.29166667	9/14/2017 12:50:20 PM	0
3	hh:\Configuration\Signals:RampFast	59.375	9/14/2017 12:50:20 PM	0
4	hh:\Configuration\Signals:RampFast	61.45833333	9/14/2017 12:50:20 PM	0
5	hh:\Configuration\Signals:RampFast	63.40833333	9/14/2017 12:50:21 PM	0
6	hh:\Configuration\Signals:RampFast	65.49166667	9/14/2017 12:50:21 PM	0
7	hh:\Configuration\Signals:RampFast	67.575	9/14/2017 12:50:21 PM	0
8	hh:\Configuration\Signals:RampFast	69.65833333	9/14/2017 12:50:21 PM	0
9	hh:\Configuration\Signals:RampFast	71.74166667	9/14/2017 12:50:22 PM	0

Figure 5 - Populated report

Parameters

You can make parameterized reports with ReportWorX 365.

1. Pick a cell in your sheet to store your parameter value. Enter a value in that cell. You may want to add a label to help you remember where the parameter is located.

	A	B
1	Start Time:	9/14/2017 12:55
2	End Time:	9/14/2017 13:00

Figure 6 - Two example parameters with labels

2. On the ReportWorX 365 home page, click **Configure Parameters** at the bottom.
3. Select a **Parameter Type** and enter the **Parameter Name**. If desired, you can also fill in the **Active Cell ID**, but this is optional and is only used to help you later determine which cell is mapped to the parameter.
4. Select the cell that contains the value of your parameter. For example, if we were going to create a StartTime parameter for Figure 6 we would select cell B1.
5. Click **Create Parameter**.

NOTE: It is very important that you have the correct cell selected before you click Create Parameter. It is the selected cell that determines the parameter location, not the text in Active Cell ID.

6. Click < **Back** to return to the home page, then select a data type that supports parameters, such as Historical Data.
7. Configure the data source as normal. Check the appropriate **Use Parameter** box and choose your desired parameter.

Start Date:

☒ Use Parameter
StartTime

End Date:

☒ Use Parameter
EndTime
Select
EndTime
StartTime

Figure 7 - Start and End Dates using parameters

8. When you click **Insert Data**, the data will be generated using the parameters you specified.
9. If you'd like to re-run the report with different parameters, change the values in the designated parameter cells, then go to the ReportWorX 365 home page and click the **Update data connections** refresh button at the bottom above Create Parameters.